SUMMARY OF TRADE AND TARIFF INFORMATION

Prepared in Terms of the Tariff Schedules of the United States

118

SPORTING GOODS

TSUS Items 731.05-731.70;
734.05; 734.10; and
734.30-735.20 (pt.)

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FOREWORD

Each Summary of Trade and Tariff Information is part of a series published by the United States International Trade Commission to provide information on conditions of competition between domestic and foreign products. This report, generally covering the period 1976 through 1980, is one of many being published in the current series of summaries.

This series provides comprehensive coverage of product uses, the domestic industry, U.S. consumption, production, and trade, and the domestic and international markets in each commodity area. The summaries are cast in terms of the eight schedules of the Tariff Schedules of the United States (TSUS).

The current series will consist of approximately 600 individual reports. The Commission will issue updated statistical tables and industry status reports as appropriate for individual summaries. The overall program will run several years, ultimately covering all items of the TSUS.

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Executive Summary

This summary covers sporting goods which are essential for participating in or training for a sport or other athletic activity. Although it includes gloves specially designed for use in sports, footwear with roller skates or ice skates permanently attached, protective headgear which does not cover the crown of the head, and certain sporting vehicles (e.g., surfboards, vehicles for sailing across ice, and motorized underwater vehicles used by scuba divers), it does not include most apparel, footwear, headwear, and vehicles.

U.S. rates of duty on imports of sporting goods from countries having most-favored-nation status currently range from free to 19.6 percent ad valorem, close to those assessed by the United States' major foreign customers (the European Economic Community, Canada, and Japan), which range from free to 18.8 percent ad valorem.

The domestic sporting goods industry comprises about 1,750 firms operating about 1,850 establishments, with a total employment of over 57,000. Although half a dozen multinational corporations manufacturing a broad range of sporting goods account for over a fourth of U.S. production, half the producing establishments specializing in sporting goods have fewer than five employees. In 1977, the 140 establishments employing 100 or more accounted for two-thirds of production and the 356 establishments with 20 to 99 employees each accounted for another one-quarter. The remaining 1,383 establishments, each with fewer than 20 employees, accounted for less than 10 percent of production.

A heightened interest in physical fitness combined with a willingness and ability to spend more money for quality products has expanded both domestic and foreign markets for U.S.-made sporting goods. The United States is the world's largest single-country market for sporting goods. During 1976-80, apparent U.S. consumption rose by 33 percent, from $2.4 billion to $3.1 billion. Although imports grew by 63 percent, from $385 million to $627 million, and their share of apparent consumption increased from 16 percent to 20 percent, exports expanded by 120 percent, from $153 million to $337 million, and their share of U.S. producers' shipments increased from 7 percent to 12 percent. Producers' shipments rose 34 percent, from $2.1 billion to $2.9 billion. The strong growth in both exports and imports is indicative of the rising importance of international trade to markets for sporting goods.

U.S. producers of sporting goods tend to have a competitive advantage in products requiring high-technology or capital-intensive manufacturing techniques and in those for which high quality and style are important considerations. The leading markets for U.S. exports are Japan, Canada, the United Kingdom, and West Germany. U.S. producers experience their stiffest foreign competition in the domestic market from Taiwan and Korea, which specialize in labor-intensive and low-end items, and to a lesser extent from Japan and France, which tend to emphasize high-quality goods.

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Description and Uses

Commodity	TSUS item No.
Fishing tackle:	
Hooks	731.05, -.06
Baskets or creels	731.10
Rods and parts	731.15
Reels and parts	731.20, -.22, -.24, -.26
Casts or leaders	731.30
Line put up and packaged for retail sale	731.40, -.42, -.44
Landing nets	731.50
Artificial baits and flies	731.65
Other equipment designed for sport fishing, fishing tackle, and parts of such equipment and tackle	731.70
Bagatelle, billiard, and pool equipment (except tables), and parts thereof:	
Balls	734.05
Other	734.10
Table-tennis equipment (except tables) and parts thereof	734.30, -.32, -.34
Tables specially designed for games	734.40, -.42
Archery equipment, and parts thereof	734.45
Badminton equipment, and parts thereof	734.48, -.51
Baseball equipment, and parts thereof:	
Gloves and mitts	734.54
Other	734.56
Croquet equipment, and parts thereof	734.60
Curling stones, and parts thereof	734.65
Football, soccer, and polo equipment, and parts thereof:	
Balls	734.70
Other	734.71, -.72
Golf equipment, and parts thereof:	
Balls, and parts thereof	734.75
Other	734.77
Ice-hockey and field-hockey equipment (except skates), and parts thereof	734.80
Lawn-tennis equipment, and parts thereof:	
Balls	734.85
Rackets	734.86,-.87
Other	734.88

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Commodity	TSUS item No.
Skates (including footwear with skates permanently attached), and parts thereof:	
Roller skates, and parts thereof	734.90
Footwear with ice-skates permanently attached	734.91
Ice-skates without footwear permanently attached and ice-skate blades and other parts	734.93
Toboggans	734.95
Skis and snowshoes:	
Cross country skis	735.01
Other	735.02
Bobsleds and luges of a kind used in international competition	735.03
Ski equipment (except skis and snowshoes) and sleds, and parts thereof:	
Cross-country ski equipment, and parts thereof	735.04
Other	735.06
Boxing gloves and other gloves specially designed for use in sports, not provided for in the foregoing provisions	735.07
Inflatable balls not provided for in the foregoing provisions	735.09
Noninflatable hollow balls not over 7.5 inches in diameter	735.10
Sponge rubber balls	735.11
Noninflatable balls not provided for in the foregoing provisions	735.12
Self-contained underwater breathing apparatus (scuba) and snorkels	735.15
Lacrosse sticks	735.17
Skeet targets	735.18
Sport, athletic, gymnastic, or playground equipment not provided for in the foregoing provisions, and parts thereof	735.20 (pt.) 1/

1/ Includes all annotations of TSUS item 735.20 except 735.2020 (puzzles) and the part of item 735.2057 which is accounted for by games which are not specially provided for. These puzzles and games will be included in a separate summary.

Note.--For the statutory description, see excerpt from the Tariff Schedules of the United States Annotated (1981) in app. A. A concordance of the Tariff Schedules of the United States (TSUS) items included in this summary with related categories in other production, export, and import nomenclatures is found in app. B.

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This summary covers a wide variety of heterogeneous products and their parts designed for sports, gymnastics, or athletics. Examples of the products included are fishing tackle; equipment for billiards, table tennis, archery, baseball, golf, ice and field hockey, and lawn tennis; curling stones, skis, boxing gloves, beach balls, lacrosse sticks, skeet targets, playground swings, pole vault pits, baseball-pitching machines, scuba devices, and exercycles. Not covered in this summary are such products as board games, poker chips, and dice; game machines; playing cards; puzzles; athletic apparel, such as uniforms, shoes, and helmets; sporting arms and ammunition, including fishing guns; vehicles, such as bicycles, canoes, electric golf carts, and hang gliders; and golf bags. However, skates with footwear permanently attached, protective equipment such as shoulder pads (but not helmets or supportive garments), gloves designed specially for sports (including motocross gloves, even though motorcycles are not covered), and certain vehicles, specifically skateboards, surfboards, toboggans, sleds, and underwater vehicles used by scuba divers, are included.

Sporting goods are used in athletic competition, tests of physical skill, physical fitness training, and recreation. The complexity of the items covered ranges from simple sponge rubber balls to life-supporting scuba gear. The size of the articles ranges from fishing lures to universal gyms. Manufacturing processes range from carving wooden duck decoys to forging golf shafts to assembling bobsleds. If there is a generalization that can be made about sporting goods, it is that U.S.-made articles tend to be of higher quality than imported articles.

Since the sporting goods industry is so diverse, it is not feasible to discuss each segment of the industry at length in this summary. However, because of their importance to the industry as a whole, three major segments--fishing tackle, golf equipment, and tennis equipment--will be given special treatment under each major topic of this summary. Together, they accounted for 35 percent of the value of sporting goods shipments in 1979 as well as 35 percent of the U.S. imports and exports in sporting goods. Other types of sporting goods will be discussed when the information about them is significant to the topic heading.

Fishing tackle

The fishing tackle covered by this summary includes rods, reels, line, hooks, artificial baits, landing nets, fishing baskets, tackle boxes, fly hooks, fish stringers, fish bags, sand spikes, and parts for all the foregoing. Fishing equipment not included is live bait, fishing guns, knives, fishing nets other than landing nets, and wearing apparel.

Rods and reels vary considerably in size, weight, and strength, as well as in quality. The major determinant of the type of outfit chosen is the type of fish intended to be caught. About 60 percent of all fishing rods are made out of fiberglass, another one-third, of graphite, and the rest, of steel or bamboo. Most rods have cork handles and metal fittings. Reels are usually made of metal, with a brass, steel, or aluminum alloy frame, and have wearing metal parts of steel. Most fishing line put up for retail sale is made of nylon. Leaders connect the hook and line.

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The most significant fishing tackle in terms of commercial value is reels, rods, and artificial baits and flies. All three products are fairly labor intensive. After various fishing reel components have been stamped or molded, they must be finished, i.e., plated, annodized, polished, painted, and so forth, before final assembly. For both rods and reels, many hand operations are required in the assembly process. Artificial baits, the value of which can depend on the skill of the craftsman, can be considered handicraft items. They are often the product of piecework done in private homes.

Golf equipment

The golf equipment covered in this summary includes balls, clubs, gloves, tees, plastic practice balls, and club head covers. Not included are bags, umbrellas, carts, and wearing apparel.

Golf balls are made with a rubber thread which is wound around a center made of rubber, liquid, nylon, fiberglass, or metal; the whole is encased in a balata cover marked in a dimple pattern. Balls are made to standard specifications, i.e., the ball must not weigh more than 1.62 ounces avoirdupois nor have a diameter of less than 1.68 inches. Some British balls deviate from this standard by having a diameter as small as 1.62 inches. Domestically produced balls are usually superior to imported balls.

Golf clubs consist of shafts, heads, and grips. Most shafts are made of steel, but a small portion are of graphite. Shafts from Japan, a chief supplier, are generally inferior to the U.S. product, but they are used in inexpensive clubs. Shafts from the United Kingdom, another leading source, are of excellent quality, but they are more expensive than most U.S.-made shafts.

There are two types of club heads: irons (made of steel) and woods (usually of persimmon or laminations of selected hardwoods, but sometimes of molded plastic). Irons are either forged or investment cast. The forging process is less expensive than investment casting, but finishing is more costly because of the several hand operations required. Consequently, most U.S.-produced heads are investment cast while those from Taiwan are forged. This situation is changing, however, because craftsmen laid off by a golf club producer in the United States set up an investment casting operation in Taiwan in 1978. Rising wage rates in Taiwan have encouraged the use of this labor-saving technology.

The many cutting and stitching operations required in the manufacture of golf gloves and club head covers make it labor intensive compared with the production of golf balls and clubs.

Tennis equipment

The tennis equipment discussed in this summary includes rackets, balls, racket string, racket covers, racket presses, nets, and gloves specially designed for use in tennis. Neither clothing nor shoes are included herein.

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Most tennis racket frames are made of wood; the rest are of steel, aluminum, or graphite fibers. The bulk of the rackets sold in the United States are strung by the manufacturer to standard specifications. High-quality rackets, however, are often strung to meet the requirements of the individual player, usually by the retailer. Unstrung rackets are accounting for an increasingly larger share of the market. Tennis rackets from Taiwan, the dominant foreign supplier, are usually strung and are inferior to the U.S.-made product. Imported rackets are usually strung with nylon; while most experienced U.S. players prefer gut. U.S.-made rackets are usually of sturdier and more durable construction than most imported rackets.

Tennis balls consist of two rubber shells (halves) cemented together under heat and pressure and covered with felt; nets are generally made of cotton or manmade fibers; racket presses are made of wood; and tennis gloves have a leather palm and a terry cloth back. Tennis balls are made in a highly automated process, with labor costs accounting for about 25 percent of total production costs in the United States. Nets, racket presses, and gloves, on the other hand, are all made under more labor intensive processes.

Other sporting goods

There are scores of sporting goods items in addition to equipment for fishing, golf, and tennis. The most significant are equipment for skiing, baseball, football, gymnastics, and weight training. Of somewhat lesser importance in value are goods for basketball, volleyball, soccer, archery, billiards, badminton, hockey, skating, table tennis, and many other activities, including playground equipment.

For some of these items, quality is a critical selling point. For example the best billiard balls are of cast resin. Technological innovations have allowed a U.S. firm to improve the quality of its injection molded, low-end billiard balls while maintaining price competitiveness with imports.

Most baseballs and softballs sold in the United States consist of a domestically produced core, and a cover, usually cowhide, which has been sewn over it in Haiti. Baseballs and softballs imported from the Orient are of significantly lower quality. Almost all baseball gloves are made in Taiwan and the Republic of Korea owing to the low labor rates for the time-consuming cutting and sewing operations.

The highest grade footballs and basketballs are made in the United States because of decades of refining expertise. On the other hand, experience has given foreign manufacturers the skill to make better soccer balls than are produced domestically. U.S. ice-hockey stick producers concede that they cannot match the quality of more expensive sticks from Finland. Ice skates from Canada and the United Kingdom are of high quality, while those from Korea are inferior to the domestic product. Snow skis from France and Austria sell well in the United States despite their high prices because they have a reputation for quality.

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Customs Treatment

U.S. customs treatment

The following table shows the current rates of duty which apply to imports of sporting goods and parts from those countries having most-favored-nation (MFN) status (col. 1); the future column 1 rates of duty negotiated in the Tokyo round of the Multilateral Trade Negotiations (MTN), 1/ which are also currently applicable to the least developed developing countries (LDDC); 2/ the rates of duty which apply to imports from countries under Communist domination or control (col. 2); 3/ and a statement as to the eligibility for duty-free treatment under the Generalized System of Preferences (GSP) 4/ of products entered under TSUS items 731.05-731.70, 734.05, 734.10, and 734.30-735.20. The staged column 1 rate reductions negotiated under the MTN and the base rate, in effect from January 1, 1972, to December 31, 1979, are shown in appendix A.

The customs consideration of what constitutes fishing tackle or sporting goods is narrowly limited by the headnotes to subparts B and D, part 5, schedule 7 of the TSUS, which is included in appendix A of this summary. Nevertheless, a number of questions have been raised over the last 15 years concerning the proper tariff classification of certain sporting goods. A compilation of U.S. Customs Service rulings and advice regarding classification issues may be found in appendix C.

In the past 5 years, a number of statutory investigations have been conducted by the Commission and the Departments of Labor and Commerce on some of the products included in this summary. These are briefly discussed below.

1/ The rates of duty in rate of duty column numbered 1 are Most-Favored-Nation (MFN) rates, and are applicable to imported products from all countries except those Communist countries and areas enumerated in general headnote 3(f) of the TSUS. However, such rates would not apply to products of developing countries which are granted preferential tariff treatment under the GSP or under the "LDDC" rate of duty column.

2/ The rates of duty in rate of duty column "LDDC" are preferential rates (reflecting the full U.S. MTN concession rate for a particular item without staging) and are applicable to products of the least developed developing countries designated in general headnote 3(d) of the TSUS which are not granted duty-free treatment under the GSP. If no rate of duty is provided in the "LDDC" column for a particular item, the rate of duty provided in column numbered 1 applies.

3/ The rates of duty in rate of duty colum numbered 2 apply to imported products from those Communist countries and areas enumerated in general headnote 3(f) of the TSUS.

4/ The Generalized System of Preferences, under title V of the Trade Act of 1974, provides for duty-free treatment of specified eligible articles imported directly from designated beneficiary developing countries. GSP, implemented by Executive Order No. 11888 of Nov. 24, 1975, applies to merchandise imported on or after Jan. 1, 1976, and is scheduled to remain in effect until Jan. 4, 1985.

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Sporting goods: U.S. rates of duty, present and negotiated, by TSUS items

TSUS item No.	Description	Present col. 1 rate of duty 1/	Negotiated col. 1 rate of duty 2/	Col. 2 rate of duty 3/	GSP eligibility
	Fish hooks, including snelled hooks:				
731.05	Snelled hooks	6.5% ad val.	5% ad val.	55% ad val.	Yes.
731.06	Other	12.8% ad val.	6% ad val.	45% ad val.	Yes.
731.10	Fishing baskets or creels	6.5% ad val.	5% ad val.	45% ad val.	Yes.
731.15	Fishing rods, and parts thereof	14.3% ad val.	7.6% ad val.	55% ad val.	No.
	Fishing reels, and parts thereof:				
	Reels:				
731.20	Valued not over $2.70 each	19.6% ad val.	9.2% ad val.	55% ad val.	Yes.
731.22	Valued over $2.70 but not over $8.45 each.	54¢ each	30¢ each	55% ad val.	No.
731.24	Valued over $8.45 each	6.9% ad val.	4.9% ad val.	55% ad val.	Yes.
731.26	Parts	11.5% ad val.	5.4% ad val.	55% ad val.	Yes.
731.30	Fishing casts or leaders	14.9% ad val.	7% ad val.	55% ad val.	Yes.
	Fishing line put up and packaged for retail sale:				
731.40	Of cotton	9% ad val.	5.8% ad val.	40% ad val.	No.
731.42	Of flax	6% ad val.	4.4% ad val.	40% ad val.	Yes.
731.44	Other	11.5% ad val.	5.4% ad val.	65% ad val.	Yes.
731.50	Fish landing nets	10.6% ad val.	5% ad val.	40% ad val.	Yes.
	Equipment designed for sport fishing, fishing tackle, and parts of such equipment and tackle, all the foregoing not specially provided for:				
731.65	Artificial baits and flies	11.6% ad val.	9% ad val.	55% ad val.	No.
731.70	Other	11.6% ad val.	9% ad val.	55% ad val.	Yes.

See footnotes at end of table.

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Sporting goods: U.S. rates of duty, present and negotiated, by TSUS items--Continued

TSUS item No.	Description	Present col. 1 rate of duty 1/	Negotiated col. 1 rate of duty 2/	Col. 2 rate of duty 3/	GSP eligibility
	Bagatelle, billiard, and pool equipment (except pool tables), and parts thereof:				
734.05	Balls	17.1% ad val.	8.2% ad val.	50% ad val.	Yes.
734.10	Other	5.1% ad val.	5.1% ad val.	33-1/3% ad val.	Yes. 4/
	Table-tennis equipment (except tables), and parts thereof:				
734.30	In sets	7.3% ad val.	5.1% ad val.	30% ad val.	Yes.
	Not in sets:				
734.32	Balls	9% ad val.	5.8% ad val.	30% ad val.	Yes.
734.32	Other	7.3% ad val.	5.1% ad val.	30% ad val.	Yes. 5/
	Tables specially designed for games:				
734.40	Of wood	7.3% ad val.	5.1% ad val.	33-1/3% ad val.	Yes.
734.42	Other	9.5% ad val.	3.8% ad val.	45% ad val.	Yes.
734.45	Archery equipment, and parts thereof	7.2% ad val.	3.4% ad val.	35% ad val.	Yes.
	Badminton equipment, and parts thereof:				
734.48	Nets of cotton, whether or not in badminton sets.	11.9% ad val.	5.6% ad val.	30% ad val.	No.
734.51	Other	8% ad val.	5.6% ad val.	30% ad val.	Yes. 4/
	Baseball equipment, and parts thereof:				
734.54	Baseball and softball gloves and mitts.	12.8% ad val.	6% ad val.	30% ad val.	Yes.
734.56	Other	6.4% ad val.	3% ad val.	30% ad val.	Yes. 6/
734.60	Croquet equipment, and parts thereof	6.8% ad val.	3.2% ad val.	30% ad val.	Yes.
734.65	Curling stones, and parts thereof	Free	Free	Free	No.

See footnotes at end of table.

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Sporting goods: U.S. rates of duty, present and negotiated, by TSUS items--Continued

TSUS item No.	Description	Present col. 1 rate of duty 1/	Negotiated col. 1 rate of duty 2/	Col. 2 rate of duty 3/	GSP eligibility
	Football, soccer, and polo equipment, and parts thereof:				
734.70	Balls	3.8% ad val.	Free	30% ad val.	Yes.
734.71	Polo mallets and soccer guards	3.8% ad val.	3.1% ad val.	30% ad val.	Yes.
734.72	Other	6.9% ad val.	4.9% ad val.	30% ad val.	Yes.
	Golf equipment, and parts thereof:				
734.75	Balls and parts thereof	5.1% ad val.	2.4% ad val.	30% ad val.	Yes.
734.77	Other	6.9% ad val.	4.9% ad val.	30% ad val.	Yes.
734.80	Ice-hockey and field-hockey equipment (except skates), and parts thereof.	3.4% ad val.	Free	30% ad val.	Yes.
	Lawn-tennis equipment, and parts thereof:				
734.85	Balls	5.6% ad val.	4.2% ad val.	30% ad val.	Yes.
	Rackets, whether or not strung:				
734.86	Not strung	5.1% ad val.	3.9% ad val.	30% ad val.	Yes.
734.87	Strung	5.3% ad val.	5.3% ad val.	30% ad val.	Yes. 4/
734.88	Other	3.8% ad val.	3.1% ad val.	30% ad val.	Yes.
	Skates (including footwear with skates permanently attached), and parts thereof:				
734.90	Roller skates, and parts thereof	3.8% ad val.	Free	20% ad val.	Yes. 4/
	Ice-skates, and parts thereof:				
734.91	Footwear with ice-skates permanently attached.	9% ad val.	5.8% ad val.	20% ad val.	Yes.
734.93	Other	4.3% ad val.	2% ad val.	20% ad val.	Yes.

See footnotes at end of table.

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Sporting goods: U.S. rates of duty, present and negotiated, by TSUS items--Continued

item No.	Description	Present col. 1 rate of duty 1/	Negotiated col. 1 rate of duty 1/	Col. 2 rate of duty 3/	GSP eligibility
	Skis and ski equipment, snowshoes, sleds, and toboggans, all the foregoing and parts thereof:				
734.95	Toboggans	3.8% ad val.	Free	33-1/3% ad val.	Yes.
	Skis and snowshoes:				
735.01	Cross-country skis	6.9% ad val.	3.5% ad val.	33-1/3% ad val.	Yes.
735.02	Other	7.3% ad val.	5.1% ad val.	33-1/3% ad val.	Yes.
735.03	Bobsleds and luges of a kind used in international competition.	Free	5.5% ad val. 7/	Free	No.
	Other:				
735.04	Cross-country ski equipment and parts thereof.	7.6% ad val.	3.5% ad val.	45% ad val.	Yes.
735.06	Other	8.1% ad val.	5.5% ad val.	45% ad val.	Yes.
735.07	Boxing gloves, and other gloves, not provided for in the foregoing provisions of this subpart, especially designed for use in sports.	6.9% ad val.	4.9% ad val.	30% ad val.	Yes. 8/
	Beach balls, play balls, toy balls, and other balls for games or sports, not provided for in the foregoing provisions of this subpart:				
735.09	Inflatable balls	10.5% ad val.	6% ad val.	30% ad val.	Yes. 4/
735.10	Noninflatable hollow balls not over 7.5 inches in diameter.	15.1% ad val.	7.8% ad val.	70% ad val.	Yes.
735.11	Sponge rubber balls	7.5% ad val.	6.9% ad val.	70% ad val.	Yes.
735.12	Other	6.9% ad val.	4.9% ad val.	30% ad val.	Yes.

See footnotes at end of table.

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Sporting goods: U.S. rates of duty, present and negotiated, by TSUS items--Continued

TSUS item No.	Description	Present col. 1 rate of duty 1/	Negotiated col. 1 rate of duty 1/	Col. 2 rate of duty 3/	GSP eligibility
735.15	Underwater breathing devices designed as a complete unit to be carried on the person and not requiring attendants.	3.4% ad val.	Free	27.5% ad val.	Yes.
735.17	Lacrosse sticks	2.6% ad val.	Free	30% ad val.	Yes.
735.18	Skeet targets	3.8% ad val.	Free	20% ad val.	Yes.
735.20	Puzzles; game, sport, gymnastic, athletic, or playground equipment; all the foregoing and parts thereof, not specially provided for.	9% ad val.	5.8% ad val.	40% ad val.	Yes. 4/

1/ Effective Jan. 1, 1981.

2/ Rate negotiated under the Multilateral Trade Negotiations in Geneva (Tokyo round), to be achieved through 8 annual reductions, with the following exceptions: (a) The full concession for items 734.10 and 734.87 was made effective on Jan. 1, 1980, (b) the duty reduction for items 734.51 and 735.11 will be 3 percent each year until the full concession is completed, (c) the concession for item 734.42 will be made in 6 annual stages commencing Jan. 1, 1982, (d) the first 2 stages of the reduction for items 734.54 and 735.07 occur on July 1, 1980, and Jan. 1, 1981, (e) the free rate for item 734.65 was already bound in the GSTT, and (f) the full concessions for items 731.05 and 731.10 will be completed on Jan. 1, 1982, after reductions of 3 percentage points in 1980 and 1981 and 1.5 in 1982. This rate is currently applicable to products from countries designated as "least developed developing countries."

3/ Rate provided in the Tariff Act of 1930.

4/ Excluding imports from Taiwan.

5/ Excluding imports from Hong Kong.

6/ Excluding imports from Haiti.

7/ These products will continue to enter free of duty, but the bound rate in the GATT will be lowered from 9 percent ad val. to 5.5 percent ad val.

8/ Excluding imports from Korea.

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In August 1976, the Commission reported that it had unanimously determined that sales of imports of Alpine ski bindings from Austria, Switzerland, and West Germany at less than fair value within the meaning of the Antidumping Act, 1921, was not causing or likely to cause injury to domestic manufacturers of ski equipment (investigations Nos. AA1921-156, 157, and 158, USITC Publication 786).

On March 28, 1979, the Commission reported that it had unanimously determined that an industry in the United States was not being injured by imports of ice-hockey sticks from Finland, which were being sold at less than fair value (investigation No. AA1921-177, USITC Publication 871).

In July 1978, the Commission found that several companies were violating a patent held by a U.S. golf ball manufacturer and ordered that the infringing articles be excluded from entry into the United States unless they were brought in under license (investigation No. 337-TA-35, USITC Publication 897).

On September 21, 1978, the Commission reported that the domestic industry was not being seriously injured by imports of snelled hooks and fishing rods, reels, and parts. The Commission did find that duty-free treatment of imported artificial baits and flies under the GSP was a substantial cause of serious injury to the domestic industry. To remedy this injury, the Commission recommended that the President suspend for 5 years the designation of artificial baits and flies as eligible for duty-free treatment under the GSP (investigation No. TA-201-34, USITC Publication 917).

On November 13, 1978, the Commission terminated its investigation into the alleged violation of a patent covering skateboards with kicktails on the basis of a determination that the patent was not valid. The U.S. Court of Customs and Patent Appeals overturned the Commission's finding on December 20, 1979, and remanded the case to the Commission. On August 13, 1980, the Commission determined that imports of skateboards with kicktails infringed a valid U.S. patent, the effect or tendency of which was to substantially injure the U.S. industry, thus violating section 337 of the Tariff Act of 1930. The Commission ordered that skateboards and platforms therefor which infringed on the patent be excluded from entry for the term of the patent unless the imports were licensed by the owner of the patent (investigation No. 337-TA-37, USITC Publication 926).

Under the trade adjustment assistance program administered by the U.S. Department of Labor, 1,175 workers from 18 firms producing sporting goods were certified as eligible to receive aid during the past 5 years; 168 workers from 7 firms were denied relief. In addition, the U.S. Department of Commerce certified 14 firms as eligible to receive trade adjustment assistance during the same period. Half these companies make fishing tackle.

Foreign customs treatment

With the exception of the United States and Canada, most countries use the Customs Cooperation Council Nomenclature (CCCN), as the basis for their tariff classifications. Fishing tackle is classified under heading 97.07 in

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the CCCN; other sporting goods, in heading 97.06. The following table shows the tariff items, present rates of duty, and rates of duty negotiated under the MTN for the major markets for U.S. exports of sporting goods--Japan, the European Economic Community (EEC), and Canada.

The most significant nontariff barrier to U.S. exports of sporting goods is the degree of paperwork necessary to win the approval of Japanese customs officials for the entry of specific shipments. Product standards also inhibit exports to Japan. For example, to enter Japan, aluminum baseball bats must be a specific length--one not used in the United States. Yet Japanese manufacturers are allowed to sell aluminum bats in a variety of lengths.

The U.S. Industry

More than half a dozen U.S.-based multinational firms make a broad variety of sporting goods. These corporations import, export, manufacture abroad, contract work out, and license the use of their trade names. There are also more than 1,700 other firms in the United States that produce sporting goods, but only about 500 firms have annual shipments valued over $100,000. Between 1972 and 1977, the latest census year for which official data are available, the number of companies in the sporting goods industry grew from 1,441 to 1,757, and the number of producing establishments increased 21 percent, from 1,553 to 1,879. This total is believed to have dipped slightly by 1980, largely because the number of producers in the skateboard industry dropped from about 200 to 30.

The 4 largest companies accounted for 26 percent of the value of shipments in 1979; the 20 largest accounted for 46 percent. Total employment peaked at 61,000 in 1972 and stood at 57,000 in 1980. About half of all the firms employ fewer than 5 people, and another fourth employ 5 to 19.

Domestic production is spread throughout the country, with California employing the largest share (14 percent) of the Nation's 46,100 production workers in 1977. Texas, New York, and Massachusetts followed with 6 percent each; 1/ Michigan employed 5 percent. Of the $2.4 billion in shipments by sporting goods producers in 1977, California accounted for 15 percent, Massachusetts and Michigan, for 6 percent each, and New York and Texas, for 5 percent each. In 1977, each establishment employed an average of 24 production workers. The average was 18 in California, 32 in Texas, 25 in New York, 29 in Michigan, and 47 in Massachusetts.

Between 1972 and 1977, the 2 most recent census years, the valued added by manufacture in the sporting goods industry increased from $920 million to $1.27 billion. Meanwhile, the value added per production worker hour increased from $9.84 to $14.82, indicating an increase in productivity. For the major producing states, the value added per production worker hour in 1977 was $16.04 in California, $15.81 in Michigan, $12.68 in Texas, and $12.61 in New

1/ Illinois probably accounted for over 6 percent of the total number of production workers but that State's employment data were withheld from the 1977 Census of Manufactures to avoid disclosing operations of individual companies.

Sporting goods: Selected rates of duty, present and negotiated, in principal foreign markets for U.S. exports, 1980

Market	Description of commodity and foreign tariff item No.	Present rate of duty 1/	Negotiated rate of duty 2/
Japan	Baseball gloves and mittens (42.03-221)	12.5% ad val.	12.5% ad val.
	Other gloves and mittens for sports (42.03-229).	12.5% ad val.	12.5% ad val.
	Table tennis requisites; parts and accessories thereof (97.04-100).	7.2% ad val.	4.8% ad val.
	Bowling balls (97.04-310)	7.4% ad val.	5.7% ad val.
	Other parlour games, including equipment for billiards (97.04-390).	12.2% ad val.	3.6% ad val.
	Appliances, apparatus, accessories and requisites for outdoor games; parts and accessories thereof (97.06-100).	6.9% ad val.	3.6% ad val.
	Skis (97.06-210)	7.6% ad val.	6.5% ad val.
	Parts and accessories of skis (97.06-220)	8% ad val.	8% ad val.
	Golf balls (97.06-311)	6.9% ad val.	3.6% ad val.
	Golf clubs (97.06-312)	6.9% ad val.	3.6% ad val.
	Other golf requisites and parts and accessories thereof (97.06-319).	6.9% ad val.	3.6% ad val.
	Balls for sports, n.e.c. (97.06-391)	7.2% ad val.	4.8% ad val.
	Other appliances, apparatus, accessories and requisites for gymnastics or athletics, or for sports (97.06-399).	7.2% ad val.	4.8% ad val.
	Fishhooks, line fishing rods, and tackle; fish landing nets; decoy "birds," lark mirrors, and similar hunting or shooting requisites (97.07).	7.2% ad val.	4.8% ad val.

See footnotes at end of table.

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Sporting goods: Selected rates of duty, present and negotiated, in principal foreign markets for U.S. exports, 1980--Continued

Market	Description and tariff item	Present rate of duty 1/	Negotiated rate of duty 2/
EEC	Special gloves, for sports (42.03 B02)	10.8% ad val.	10% ad val.
	Bats, balls and nets for table-tennis (97.04 B).	7.6% ad val.	5% ad val.
	Other parlour games, including equipment for billiards (97.04 B).	7.8% ad val.	5.6% ad val.
	Cricket and polo equipment (97.06 A)	Free	
	Tennis rackets (97.06 B)	12% ad val.	7.3% ad val.
	Other sporting and athletic goods (97.06 C)	8.6% ad val.	6% ad val.
	Fishhooks, unmounted (97.07 A)	4.7% ad val.	3.8% ad val.
	Other fishing tackle and rods and hunting decoys (97.07 B).	10.7% ad val.	6.9% ad val.
Canada	Curling stones, and handles (30100-1)	7% ad val.	5.5% ad val.
	Trawls, trawling spoons, fly hooks, bait sportsmen's fishing reels, fishing rods, and fishing tackle, n.o.p. (44034-1).	15% ad val.	10.2% ad val.
	Fishhooks, n.o.p. (44034-2)	9.2% ad val.	6.8% ad val.
	Golf shafts of seamless steel, coated or not, but not chromium plated (44609-1)	13.6% ad val.	9.2% ad val.
	Roller skates and parts thereof (45000-1)	13.6% ad val.	9.2% ad val.
	Ice skates, not including skates with boots attached, and metal parts thereof (45005-1).	11.4% ad val.	8% ad val.
	Hockey sticks (50603-1)	4.8% ad val.	4% ad val.
	Woodshafts for golf club handles and wood golf heads, rough turned (50640-1).	4.8% ad val.	4% ad val.
	Golf clubs and finished parts thereof; racquets and racquet frames and baseball bats; balls of all kinds for use in sports, games or athletics, n.o.p. (51100-1).	15% ad val.	11.3% ad val.

See footnotes at end of table.

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Sporting goods: Selected rates of duty, present and negotiated, in principal foreign markets for U.S. exports, 1980--Continued

Market	Description and tariff item	Present rate of duty 1/	Negotiated rate of duty 2/
Canada--Con.	Shafts of steel, for use in the manufacture of golf clubs (51103-1).	Free	Free
	Cricket bats, balls, gloves and leg guards (51105-1).	15% ad val.	11.3% ad val.
	Shafts, composed wholly or in part of graphite, for use in the manufacture of golf clubs (51106-1).	Free	Free
	Skis (51110-1)----------	15% ad val.	11.3% ad val.
	Ski fittings (51115-1)----------	15% ad val.	11.3% ad val.
	Ski poles (51120-1)----------	15% ad val.	11.3% ad val.
	Bagatelle and other game tables and boards (51800-1).	18.8% ad val.	15% ad val.
	Billiard tables, cues, balls, cue-racks, and cue-tips (51805-1).	18.8% ad val.	15% ad val.

1/ Current rates of duty applicable to imports from the United States.
2/ Final rates negotiated under the Multilateral Trade Negotiations.

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York. 1/ The average hourly wage that year for sporting goods production workers was $4.17 nationwide, $3.86 in California, $5.20 in Massachusetts, $3.72 in Texas, $3.90 in New York, and $5.21 in Michigan.

The Sporting Goods Manufacturers Association published A Study of Financial Performance in the Sporting Goods Industry 1979. The study includes a comparison of data covering 46 publicly held companies which have a sporting goods line of business with statistics on all manufacturers. 2/ The comparison of the after-tax returns on sales, assets, and investment indicates that large companies which make sporting goods are not faring as well as other companies (table 1, app. D). For example, while the return on sales for all manufacturers increased from 5 percent to 5.6 percent during 1976-78, it dropped from 3.5 percent to 3.1 percent for sporting goods producers. Similarly, the return on assets for all manufacturers grew from 7.3 percent to 8.3 percent, but for sporting goods producers, it dipped from 4.5 percent to 4.4 percent.

The technology level for several sporting goods items is not high and innovations in production are gradual. For products requiring little technology and considerable hand labor--such as sports gloves, certain table-tennis equipment, and baseballs--large sporting goods firms usually contract work out to foreign suppliers.

Most sporting goods sales are now made in chainstores which specialize in recreation products and buy directly from the manufacturer. The move in this direction has occurred at the expense of specialty stores, which normally purchase from distributors. Department stores and pro shops also sell sporting goods. Prices differ according to the type of outlet and its prospective customers; there are usually quantity discounts. Full-line sporting goods producers have regional sales forces, but small manufacturers often hire representatives who sell a range of products for several firms. Another important market--and the only market for items such as universal gyms, football blocking sleds, glass basketball backboards, and pole-vault pits--is institutions, i.e., schools, health clubs, and sports stadiums. Schools usually get a discounted price.

Fishing tackle

About 160 U.S. firms, employing approximately 9,000 workers, specialize in the production of fishing tackle. The 4 largest companies account for 15 percent of U.S. shipments; the top 20, for 65 percent. The major producing States are Arkansas, California, Florida, Iowa, Michigan, Minnesota, and Wisconsin. In 1977, the value added by manufacture per production worker hour was $11.71 for the fishing tackle industry compared with $14.82 for the entire

1/ Value added by manufacture and production worker hour data for Massachusetts were with held from the 1977 Census of Manufactures to avoid disclosing operations of individual companies.

2/ The source of data on "all manufacturers" was the Federal Trade Commission, Quarterly Financial Report for Manufacturing Corporations.

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sporting goods industry. 1/ This marginal performance was compounded by unseasonably heavy spring snows in 1978 and 1979, which restricted fishing activity.

Fishing reels are a high-technology, item but rods and hooks are less sophisticated. Artificial baits and flies are labor intensive; although the bulk are made by about 40 producers, they are often made in private homes on a piecework basis. The assembly of rods and reels also requires a great deal of hand labor. The average hourly wage in the fishing tackle industry in 1977 was $3.71 compared with $4.17 for the entire sporting goods industry.

The principal retail outlets for fishing tackle are sporting goods stores, outdoor specialty shops, and discount/department stores.

Golf equipment

About 90 U.S. firms make golf equipment, with the top 4 accounting for 46 percent of the value of shipments and the top 20 accounting for 90 percent. About 10,800 workers are employed in the industry. The major producing States are California, Illinois, Ohio, and Wisconsin.

Financial indicators available for five publicly owned firms whose sole business is the manufacture of golf equipment suggest that the after tax returns on sales, assets, and investment for the golf equipment industry was slightly above the average for all manufacturers in 1978 and above the figures for sporting goods in general. 2/ In addition, the value added by manufacture per production worker hour for all producers of golf equipment was $16.27 in 1977.

The manufacture of golf balls and golf club shafts requires high technology. Only two companies in the United States make steel shafts, and nine firms make golf balls. The production of investment-cast iron club heads is very capital intensive. The only labor-intensive portions of the industry are the manufacture of gloves and golf club head covers. The average hourly wage for the golf industry was $5.04 in 1977.

Golf equipment is sold mostly through sporting goods stores and pro shops at country clubs. Sales to these outlets are usually made by the producer's own sales force.

Tennis equipment

About 30 companies, employing 3,300 workers, produce tennis equipment in the United States. The 4 largest firms account for half of U.S. shipments; the top 20 account for 95 percent. The major producing States are New York, Massachusetts, Rhode Island, Pennsylvania, Ohio, and California. The financial performance of the tennis equipment industry is poorer than that for sporting goods in general, but it is believed to have rebounded in 1980.

1/ U.S. Department of Commerce, Bureau of the Census, 1977 Census of Manufactures.

2/ Sporting Goods Manufacturers Association, op. cit.

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The manufacture of tennis balls is capital intensive but not very sophisticated. Tennis rackets, on the other hand, require highly skilled labor. Technology in the racket-manufacturing process and racket design have changed regularly in the last 5 years.

Tennis equipment is usually sold directly by U.S. manufacturers' representatives to sporting goods chain stores, specialty shops, pro shops, and discount/department stores. Importers often go through regional distributors to reach the retailers.

Other sporting goods

About a dozen large corporations account for much of the production of the remaining types of sporting goods. Some of these companies also make golf and tennis equipment. The approximately 1,500 additional firms which produce other sporting goods employ about 30,000 people.

The only other segment of the sporting goods industry which was described in detail by the 1977 Census of Manufactures was that which produced playground, gymnasium, and exercise equipment. There are about 90 manufacturers in this segment, with a total employment of 6,000. The principal producing States are New York, Illinois, Pennsylvania, Iowa, Missouri, Washington, and California. The value added by manufacture per production worker hour was $15.67 in 1977, better than the sporting goods industry average of $14.82. The financial success of firms in this industry segment and the expanding market for exercise equipment have led several companies to enter the competition in this field.

The production of playground, gymnasium, and exercise equipment is basically capital intensive. The average hourly wage in this industry was $4.29 in 1977. The value added per production worker that year was $29,956, compared with $31,035 in the golf industry (also capital intensive), $21,117 in the fishing tackle industry (labor intensive), and $29,609 for producers of all other sporting goods.

Traditionally, the largest market for playground, gymnasium, and exercise equipment has been schools and other institutions. These markets are usually supplied by manufacturers' representatives or distributors. However, surging interest in physical fitness has led to strong growth in the sale of exercise equipment, such as exercycles and weight-lifting sets, to individual consumers through stores specializing in sporting goods.

The U.S. Market

Domestic market profile

Males between 18 and 34 are the largest market for sporting goods. While younger men buy most of the footballs and basketballs, older customers are the chief purchasers of equipment for golf, fishing, and racquetball. Women have been significant customers for tennis and ski equipment for some time, but with enactment of legislation requiring more balanced expenditures in public

schools for men's and women's sports, purchases by females of softball and racquetball gear and basketballs are rising quickly. Some sporting goods, such as wrestling mats, universal gyms, pole-vault pits, football blocking sleds, and basketball backboards, are sold almost exclusively to institutions, primarily schools and health clubs.

Two factors had a significant role in inhibiting the demand for sporting goods during 1976-80. First, the energy crisis made athletic pursuits which require travel or motorized vehicles more expensive. Examples include alpine skiing, mountain climbing, water skiing, and motocross racing. Second, school athletic budgets tended to become static because of public resistance to property tax increases upon which budgetary expansion is usually dependent. Schools tended to delay purchases of new equipment and to drop sports of marginal interest in order to economize.

Although about six domestic firms manufacture a broad variety of sporting goods, no company makes all types. Even each of the major producers has specializations upon which it has based its reputation. There are many sporting goods products that are not offered by the major producers because the demand is limited. Such products are the domain of smaller firms which focus on specific markets. However, when these small or intermediate-size firms show promise for profitability, they are frequently purchased by the sporting goods conglomerates.

No foreign producers offer a comprehensive range of sports products for the U.S. market, but a number of importers put together lines of sporting goods from a variety of foreign manufacturers. Domestic producers compete successfully with imports by utilizing high production technology, style changes, and sophisticated market advertising to sell products with style and quality in the middle and upper price ranges. Competition with imports at the low end, nowever, has forced some companies out of the market; these firms were usually small and not diversified. Certain sporting goods are so labor intensive that U.S. firms shift the production of these items to countries with low labor rates. Examples include the manufacture of sports gloves in Korea and Taiwan, baseballs in Haiti, and low-quality tennis rackets in Taiwan. In only a few areas do foreign producers dominate the U.S. market for a specific item because of superior quality or technology. These are ice-skate blades from Canada, ice-hockey sticks from Canada and Scandinavian countries, ski bindings from France, and soccer balls from a variety of sources. In certain product areas--fishing tackle and table-tennis and ski equipment--the rivalry between foreign and domestic producers is intense because of the similarity in both the quality and the price of the goods. In still other areas, there is little competition from imports because U.S. manufacturers enjoy economies of scale and produce a high-quality product. This is true for golf clubs, archery equipment, and water skis.

Fishing tackle.--About 25 million people fished in the United States in 1980, 70 percent were males. Of the men, one-quarter were over 49 and just under one-fifth were in each of the age groups 25 to 34 and 35 to 49. Of the women, 55 percent were over 49. Half of all the fishing was done in the North

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Central and Southeastern sections of the United States (which, coincidentally, contains half the U.S. population). 1/

Participation in fishing has been declining in recent years owing to heavy spring snows, which have restricted the fishing season; high gasoline prices, which have discouraged fishing trips; and acid rains in upstate New York, which have killed the fish population in many lakes.

Many manufacturers import some type of fishing tackle to complement their product lines. In 1977, fishing rod manufacturers accounted for 59 percent of all the imports of fishing reels. Likewise, some reel producers import rods or reels of a type not manufactured by them.

Rods and reels account for about half the value of shipments by domestic fishing tackle producers. About 90 percent of the rods made in the United States are produced by nine firms, with the largest supplying 35 percent of total shipments. About 95 percent of the U.S.-made reels are manufactured by three firms, with the largest contributing about 75 percent of the total. Relatively smaller firms find it difficult to compete with the larger U.S. and foreign rod and reel producers; however, the smaller firms supply most of the market for other types of fishing tackle, such as artificial baits and flies, fishing line, sinkers, and snap swivels.

Golf equipment.--In 1979, about 8 percent of the population in the United States played golf, representing a significant drop from 15 percent in 1965. The decline in participants has been attributed to the increased expense of playing (equipment, greens fees, and gasoline), inadequate instruction in schools, and an increased participation in activities with a better cardiovascular training effect, such as jogging, swimming, and racquetball. However, the average golfer in 1979 played more rounds of golf than the 1965 counterpart, and used higher quality equipment.

About one-third of all U.S. golfers are in the North Central region, 21 percent are in the Northeast, and 16 percent in California. About three-quarters of all golfers are male. About one-quarter of the men are over 49; and over two-fifths are between 25 and 49. Of the female golfers, 58 percent are over 49, and one-third are between 25 and 49. 2/

Golf clubs account for about three-quarters of the value of producers' shipments of golf equipment. The seven largest producers account for 70 percent of production. Most golf club manufacturers send specifications for club components to contractors. A large number of finishing operations are performed by the club manufacturers, both before and after assembly of the parts. Much time and money is invested in improving the technology of both the manufacturing process and the end product. Domestic firms compete with each other chiefly on the basis of quality. Foreign firms usually lack the expertise to make quality clubs; that fact and high shipping costs are significant deterrents to imports.

1/ "Monthly Sports Census," The Sporting Goods Dealer, January 1981, pp. 11-15.

2/ Ibid.

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Only two domestic companies make golf club shafts. Some U.S. club manufacturers import shafts from Japan but the quality is reportedly inferior to that of the domestic product. Japanese shafts are used primarily for low-end golf clubs.

Virtually all U.S. producers' shipments of golf balls are supplied by nine firms, one of which accounts for over half the shipments. Imports are generally inferior to the domestic product. Serious golfers usually buy U.S.-made balls, which are subjected to more stringent quality standards and inspections than most imported balls.

As do producers of other types of gloves, U.S. golf glove manufacturers reportedly experience intense competition from imports. The many cutting and stitching operations involved make glove production quite labor intensive, giving countries with low labor rates a competitive advantage. About 15 firms manufacture golf gloves in the United States, but 2 companies account for about half the output.

Tennis equipment.--The sport of tennis experienced a boom in popularity in the late 1960's and early 1970's, and then stabilized in 1974. The number of people playing tennis in the United States started to drop in 1976. Reasons cited by the industry for the decline were a shortage of courts in metropolitan areas and the lack of instruction to help players improve their game. Beginning players would frequently give up tennis after reaching a plateau in the quality of their play. In addition, a large number of participants dropped out of tennis as they took up racquetball when it was "rediscovered" in the late 1970's. However, the core of tennis players that remained tended to spend an increasing amount of money on clothing and better quality equipment.

One-quarter of all U.S. tennis players live in the Northeast, slightly fewer are in the Southeast, and one-fifth are in California. Female participants outnumber male players by a small margin. Forty-six percent of the women are ages 14 to 24 and 42 percent are 25 to 49; 40 percent of the men are between 14 and 24 and 45 percent are 25 to 49. 1/

Tennis balls, which account for about half the value of U.S. shipments of tennis equipment, are produced by four firms in the United States. The largest accounts for about 40 percent of domestic production, and each of the other three supplies approximately 20 percent. Tennis balls account only for a small portion of the total output of each of the four companies.

Tennis balls are made in a highly automated process; labor costs account for about 25 percent of total production costs in the United States. The capital intensiveness of the production process gives U.S. producers a competitive advantage over foreign manufacturers. Furthermore, domestically made balls are superior to the bulk of imported balls. This is especially significant because the market consists mostly of experienced tennis players who are more concerned with quality than with price.

1/ Ibid.

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Tennis rackets, which constitute 40 percent of U.S. shipments of tennis equipment, are produced domestically by 22 firms. Four companies make all the wood rackets, and five manufacturers account for 90 percent of metal rackets. A higher degree of technological expertise and craftsmanship is involved in making wood rackets. By 1975, domestic racket producers had essentially abandoned the low end of the market to manufacturers in Taiwan. Some U.S. companies now make less expensive rackets in Taiwan under other brand names in order not to discredit the quality associated with their U.S. brand. Only one foreign firm, in Japan, has developed a racket that compares with domestic rackets in terms of quality--the determining sales factor in the U.S. market today.

U.S. consumption

Apparent U.S. consumption of sporting goods grew from $2.4 billion to an estimated $3.1 billion between 1976 and 1980, or by 33 percent (table 2). Industry sources indicate that the booming interest in jogging, general exercise, and fashion in sports clothing has benefited sporting goods retailers more than producers of athletic hardgoods. These sources calculate that shipments of athletic shoes and apparel approached $3 billion in 1980. 1/

The share of apparent consumption of sporting goods provided by imports jumped from 16 percent to 20 percent between 1976 and 1978, where it remained through 1980. Much of the increased share held by imports can be attributed to the rapid expansion of imports of various sports gloves. During 1976-79, sports gloves accounted for nearly one-third of the $210 million growth in total imports of sporting goods. Four factors were responsible for the doubling of sports glove imports from approximately $62 million to $125 million during 1976-79. (1) U.S. glove manufacturers were at a competitive disadvantage with low-wage-rate nations because of the many cutting and stitching operations involved in making sports gloves. (2) Japanese and U.S. investors took advantage of the U.S. GSP program by establishing and/or expanding sports glove plants in designated beneficiary developing countries in Asia. (3) Over the period, there was an increase in participation in sports requiring gloves, e.g., softball, racquetball, motocross, and skiing. (4) It became fashionable, and to some extent functional, to wear specialized gloves for each sport, such as baseball batting gloves, tennis gloves, soccer goalie gloves, and skateboarding gloves. In the United States, some plants closed and production declined despite the expanding market.

Fishing tackle.--Apparent U.S. consumption of fishing tackle expanded from $305 million to $462 million during 1976-80, representing a growth of 51 percent (table 3). The share of the market supplied by imports during 1976-80 averaged 27 percent. Imports accounted for 41 percent of the shipments of fisning reels in 1980, and 30 percent of those of rods. Reels and rods make up almost half the market for fishing tackle. The import share for the two combined was 36 percent in 1980 and 39 percent in 1977.

1/ The industries which produce athletic footwear and clothing will be discussed in separate summaries.

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Golf equipment.--Although the apparent consumption of golf equipment grew by 21 percent during 1976-80, the trend was erratic; consumption jumped from $303 million in 1976 to $358 million in 1977 and then slumped to $334 million in 1979 as a result of the recession. Inflation helped bring the value up to $365 million in 1980 (table 4). Imports gradually increased their share of apparent consumption from 6 percent to 10 percent during 1976-80. Golf gloves account for over half the value of imported golf equipment but only a minute portion of U.S. production.

Tennis equipment.--Apparent consumption of tennis equipment rose from $143 million in 1976 to $158 million in the peak year of 1977, but dropped to $112 million in 1980 as participation in tennis fell sharply (table 5). The overall decline during 1976-80 was 22 percent. The growth in 1977 reflected the step up from cheap imported rackets to expensive, high-quality U.S.-made rackets made by a significant number of tennis players. The simultaneous decline in the number of new players (those most likely to buy imports of marginal quality) is responsible for the drop in the share of consumption provided by imports from 35 percent in 1976 to 23 percent in 1977. Imports averaged 26 percent of consumption during 1978-80.

Other sporting goods.--During 1976-80, apparent consumption of sporting goods other than equipment for fishing, golf, and tennis climbed 36 percent, from $1.6 billion to $2.2 billion (table 6). The share of apparent consumption accounted for by imports jumped from 14 percent in 1976 to 20 percent in 1978, where it remained through 1980. Many manufacturers, both foreign and domestic, have taken advantage of the GSP in supplying the U.S. market with labor-intensive products from beneficiary developing countries with low wage rates.

For the largest segment in this category--playground, gymnasium, gymnastic, and exercise equipment--consumption averaged about $271 million during 1976-79; it increased to $309 million in 1980 largely as a result of growing demand for home exercise devices (table 7). Imports held an 8-percent share of consumption each year during 1978-80.

U.S. producers' shipments

U.S. producers' shipments of sporting goods expanded from $2.1 billion to an estimated $2.9 billion during 1976-80, or by 34 percent (table 2). Of the total shipments in 1980, fishing tackle accounted for 13 percent; golf equipment, 15 percent; tennis equipment, 4 percent; and playground, gymnasium, gymnastic, and exercise equipment, 11 percent.

Table 8 shows the value of U.S. producers' shipments in 1972 and 1977, the most recent years for which statistics are available on a detailed level. The data confirm the conclusion that interest in physical fitness boosted sales in most segments of the sporting goods industry. While producers' shipments in the less physically demanding sports of bowling and billiards fell between 1972 and 1977, all other segments showed an increase. Leading the way were ice-skates; health, physical fitness, and exercise equipment; archery equipment; baseball mitts and gloves; athletic field equipment; tennis

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equipment; home playground equipment; and winter sports equipment (except skis and skates). Shipments in each of these product areas more than doubled from 1972 to 1977. Shipments of equipment for the moderately physically taxing sports of fishing and golf grew at a rate very close to the industry average of 44 percent. Industry sources indicated that the tendency for shipments of sporting goods which appeal to fitness-conscious consumers to grow at a faster rate than those other sporting goods continued during 1978-80.

Fishing tackle.--Producers' shipments of fishing tackle climbed 53 percent, from $238 million to an estimated $365 million, during 1976-80 (table 3). In 1977, fishing reels accounted for 25 percent of the shipments by fishing tackle producers, while rods accounted for 21 percent, and artificial baits and flies, for 20 percent.

Golf equipment.--Despite high general inflation rates during 1976-80, the 24-percent expansion of producers' shipments of golf equipment from $339 million to an estimated $422 million did yield real growth. Between December 1975 and July 1980, producer prices for all golf equipment increased only 9.4 percent. Golf balls, which constituted 28 percent of the value of producers' shipments in 1977, were priced 18 percent lower in July 1980 than in 1967. Over the same 13 year period, the price of golf clubs, which accounted for 48 percent of shipments in 1977, increased only 24 percent. The annual growth in shipments was interrupted in 1978 as retailers tried to alleviate excess inventories after overly optimistic ordering the previous year (table 4).

Tennis equipment.--The trend in producers' shipments of tennis equipment was erratic during 1976-80, although there was an overall increase of 19 percent. Shipments are estimated to have peaked at $135.1 million in 1977 and then dropped to $108 million in 1979 as tennis players switched to other recreational activities. With the remaining tennis players buying higher quality equipment, shipments rebounded to an estimated $119 million in 1980 (table 5). Tennis balls accounted for 47 percent of the value of shipments in 1977, and rackets made up 39 percent.

Other sporting goods.--Shipments of other sporting goods are estimated to have grown 33 percent during 1976-80, from $1.5 billion to $1.9 billion (table 6). Included in this category are products that experienced a sharp decline in shipments, such as equipment for billiards and bowling; products that experienced strong growth over the last 5 years, such as home exercise devices and softball equipment; fad items, such as roller skates and skateboards; stable goods, such as footballs and basketballs; and items that depend on the weather to generate sales, such as ice skates and snow skis. Table 8 details the importance of these items in the overall industry.

The most important of the sporting goods covered here is playground, gymnasium, gymnastic, and exercise equipment. Shipments are estimated to have been stable at about $260 million during 1976-78, and then the interest in home exercise devices boosted shipments 17 percent over the next 2 years to $305 million in 1980 (table 7). Health, physical fitness, and exercising equipment accounted for 40 percent of the shipments in this category in 1977, gymnasium and gymnastic equipment made up 23 percent, and playground equipment, 37 percent.

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U.S. imports

During 1976-80, imports of sporting goods ballooned from $385 million to $627 million, or by 63 percent (table 2). Most of the growth was in items that are basically labor intensive, such as sports gloves, baseballs, soccer balls, and certain fishing tackle. The major suppliers of such commodities--Taiwan, Korea, and Haiti--accounted for over half of total U.S. imports of sporting goods in 1980. However, imports of high-quality snow skis and bindings from Europe also rose rapidly. Of the total imports of $627 million in 1980, gloves accounted for 20 percent, fishing tackle, for 20 percent, ice and snow sports equipment (except ski gloves), for 18 percent, and baseballs, softballs, and soccer balls, for 7 percent.

Taiwan and Korea supplanted Japan as the chief suppliers of sporting goods to the United States during 1976-80, with imports from Taiwan more than doubling from $71 million to $189 million and imports from Korea bounding from $40 million to $108 million. Meanwhile, imports from Japan edged up from $73 million to $75 million (table 9). Taiwan's share of total sporting goods imports grew from 19 percent to 30 percent between 1976 and 1980, and Korea's share jumped from 10 percent to 17 percent, and Japan's portion slipped from 19 percent to 12 percent. From 1976 to January-September 1980, the share of total imports accounted for by developing countries designated as beneficiaries under the Generalized System of Preferences grew from 42 percent to 60 percent, with half those imports coming from Taiwan during January-September 1980 (table 10).

Fishing tackle.--Imports of fishing tackle rose 50 percent during 1976-80, from $84 million to $127 million (table 3). Inventories over stocked as a result of orders received in 1977 and heavy spring snows in 1978 led to reduced imports in 1978 and an interruption in the regular growth pattern over the 5-year period. Rods and reels accounted for two-thirds of the imports in 1980.

Japan supplied about one-third of the fishing tackle imports during 1976-80. Meanwhile, the share of imports from Korea and Taiwan together jumped from 24 percent to 40 percent between 1976 and 1980, offsetting the decline in the collective share of France and Sweden from 25 percent to 11 percent (table 11). The share of imports accounted for by GSP-eligible countries grew from 31 percent in 1976 to 46 percent in January-September 1980 (table 12).

During 1976-80, imports of fishing rods increased 39 percent in quantity (from 5.4 million to 7.5 million rods) and 86 percent in value ($14.4 million to $26.8 million), as the average unit value grew from $2.69 to $3.56 (table 13). Taiwan's share of total imports rose from 37 to 47 percent in terms of value, Korea's share jumped from 22 to 37 percent, and Japan's share fell from 32 to 12 percent. During 1976-79, the portion of fishing rod imports accounted for by GSP-eligible countries grew from 67 percent of the value to 88 percent (table 14). Haiti supplied 4 percent of the value of total imports in 1979, with most of its shipments entering under TSUS item 807.00, which is used by domestic producers to reduce assembly (labor) costs. It provides that duty on articles of U.S.-fabricated components assembled abroad be applied only to what is essentially the value added abroad (i.e.,

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the cost of assembling the parts). The strong position of developing countries is indicative of the labor intensiveness of the process for manufacturing fishing rods.

Although fishing reels are also labor intensive, the manufacturing processes and quality-control considerations are more sophisticated than those for fishing rods. During 1976-80, Japan increased its dominant position among import suppliers. Although the value of total imports increased 29 percent (from $41.9 million to $54.2 million), the quantity imported dropped 8 percent (from 8.3 million reels to 7.6 million reels). Japan's share of the value grew from 37 percent to 51 percent, and that of Korea, from 8 percent to 21 percent. The portion provided by France fell from 25 percent to 6 percent (table 15). GSP-eligible countries accounted for 25 percent of the value of reel imports in 1980.

Golf equipment.--Golf equipment accounted for only 6 percent of total imports of sporting goods in 1980. Imports of golf equipment grew from $18.7 million to $35.3 million during 1976-80, representing an 89-percent increase. Although imports increased their share of apparent consumption during 1976-80 from 6 percent to 10 percent, imports were less than two-fifths the size of exports in 1980 (table 4). Fifty-six percent of the imports in 1980 were golf gloves, 5 percent were balls, 8 percent were clubs, and 24 percent were parts of clubs. The share of imports of golf equipment supplied by GSP-eligible countries rose from 48 percent in 1976 to 70 percent in 1980, with Korea accounting for one-half in 1980 (table 16). The share provided by Japan dropped from 24 percent to 17 percent between 1976 and 1980 (table 17).

Golf glove imports amounted to $19.8 million in 1980. Korea supplied 52 percent of the imports, and the Philippines and Japan claimed 18- and 13-percent shares, respectively. Of the total, 98 percent came from Asia and 85 percent entered duty free under the GSP.

Canada supplied over two-thirds of the imports of golf balls, which totaled $1.8 million in 1980. Although Korea provided one-quarter of the imports, only 13 percent of the total entered duty free under the GSP. The United Kingdom, which accounted for 7 percent of the imports, generally offers a higher quality ball than Korea and competes more directly with U.S.-made golf balls. In 1980, balls imported from the United Kingdom had an average unit value of $7.82 per dozen, while that of those those from Korea was $2.09. Canadian balls, valued at $3.69 per dozen, fall in the middle in terms of quality.

Altnough golf club imports totaled $2.9 million in 1980, they were only 5 percent as large as exports and supplied a small fraction of U.S. consumption. In terms of value, Japan supplied 40 percent of the imports in 1980, followed by Canada with 29 percent and Portugal with 11 percent. Of the total 1980 imports, only 4 percent entered duty free under the GSP, and were primarily from Taiwan.

Imports of parts of golf clubs reached $8.6 million in 1980. Taiwan, Mexico, Japan, and Canada supplied 29, 27, 23, and 21 percent of the imports, respectively, in 1980. Virtually all the imports from Mexico and Canada

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entered under the provisions of TSUS item 806.30. 1/ Of the total imports, 29 percent entered duty free under the GSP; almost all were from Taiwan. Imports of golf club parts were less than half the amount of exports in 1980.

Tennis equipment.--During 1976-80, imports of tennis equipment fell irregularly from $50 million to $28 million, representing a 44-percent decrease (table 5). In 1980, tennis equipment made up just 5 percent of total imports of sporting goods. While the ratio of imports to consumption was fairly stable over the period, imports fell from a position where they were 7 times as large as exports in 1976 to one where they were roughly equivalent in 1979; they were almost one-fifth smaller than exports in 1980. As previously stated, the market for low-end imports all but disappeared when the number of new players declined and the remaining players tended to upgrade their equipment with U.S.-made products.

Hardest hit among the suppliers was Taiwan, the chief source of low-end rackets. Imports from Taiwan shrank from $18.7 million to $9.5 million during 1976-80 (table 18). Taiwan's share of tennis equipment imports slipped from 37 percent to 34 percent, while the share supplied by all GSP countries remained at 45 percent (table 19). France was the only leading supplier whose exports to the United States increased during 1976-80, from $1.1 million to $3.1 million. The principal commodity imported from France is natural-gut tennis string.

In 1979, tennis rackets accounted for 68 percent of the U.S. imports of tennis equipment, balls made up 4 percent, racket string 19 percent, and other equipment, 13 percent.

Imports of tennis balls plunged from 26.4 million balls to 2.1 million during 1976-80, and the value of imports dropped from $10.5 million to $1.1 million. The United Kingdom supplied 70 percent of the imports in 1979 in terms of value ($2.4 million), and Korea supplied 17 percent. But imports from the United Kingdom accounted for only one-quarter of the total in 1980; Korea supplied 36 percent and Ireland, 31 percent. Developing countries supplied 44 percent of the imports in 1980, virtually all entering duty free under the GSP.

In 1978, the number of tennis balls imported exceeded the number exported by a factor of 12. But by January-June 1980, exports had nearly caught up with imports, despite an average unit value of $1.62 for exported balls and $0.54 for imports. It is clear that, to a large extent, consumers are rejecting the generally inferior imported balls. In addition, because the production of tennis balls is a highly automated process, foreign producers can not attain a competitive edge from lower labor rates.

1/ TSUS item 806.30 provides for the importation of articles of metal which have undergone a process of manufacture in the United States, were exported for further processing, and returned to the United States for more processing. A duty is placed only on the value of the processing done outside the United States.

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Despite a decline in tennis racket imports during 1976-80, from 9.1 million to 2.5 million, they were still almost triple the number of exports in 1980. However, the average unit value of the exported rackets in 1980 was $21.47 compared with $7.50 for the imported racket. Consequently, as imports fell in value during 1976-80, from $32.3 million to $19.1 million, they were surpassed by exports, which reached $20.1 million in 1980. Taiwan supplied 56 percent of the total value of U.S. tennis racket imports in 1980, and Belgium supplied 28 percent. Since Taiwan lost GSP eligibility for strung rackets in 1980, only 21 percent of total racket imports entered duty free under the GSP.

Most imported rackets are inferior in quality to the domestic product; U.S.-made rackets are usually of sturdier and more durable construction. High-quality rackets are generally not sold prestrung; 76 percent of the rackets imported in 1980 were already strung. Of those, virtually all were strung with nylon string instead of strings of gut, which are preferred by many players in the United States. Imports of strung rackets had an average unit value of $4.29 in 1980; unstrung rackets were valued at $17.62. Domestic producers abandoned the low end of the tennis racket market to imports over two decades ago; now, that segment of the market is disappearing.

Imports of tennis equipment except balls and rackets were stable during 1976-80, increasing from $7.2 million to $8 million. Exports of comparable tennis equipment exceeded imports by 40 percent in 1980. Tennis racket string accounted for two-thirds of the imports of miscellaneous tennis equipment in 1980. France provided 52 percent of the string, mostly natural gut, while Japan supplied 25 percent. Only 4 percent entered duty free under the GSP.

Other sporting goods.--Imports of sporting goods other than fishing tackle or golf or tennis equipment grew from $232 million in 1976 to $427.3 million in 1980, or by 88 percent (table 6). During 1976-80, the share of imports supplied by Taiwan doubled from 17 percent to 35 percent (table 20). Korea was the second leading source, providing 16 percent in 1980. In contrast, Japan and France lost significant shares, the former's share dropping from 14 percent to 6 percent and France's, from 13 percent to 9 percent. The share of imports supplied by GSP countries expanded from 45 percent to 64 percent (table 21).

Of the $437 million in imports in this category in 1980, snow skis and bindings accounted for 17 percent; ski gloves, baseball gloves, and miscellaneous sports gloves, for 28 percent; baseballs and softballs, for 8 percent; ice skates and roller skates for 17 percent; and playground, gymnasium, gymnastic, and exercise equipment, for 6 percent.

Imports of snow skis and bindings are believed to supply over half the U.S. market. Imports of snow skis jumped from $36.7 million to $73.2 million during 1976-79, but fell to $43.7 million in 1980 because of poor snowfall. Together, France and Austria supplied two-thirds of the skis in 1980. Only 4 percent entered duty free under the GSP. The average unit value of imported skis in 1980 was $42.12 per pair compared with $86.39 for U.S. exports. Imports of ski bindings totaled $32.8 million in 1980 (down from $42.5 million in 1979), with France supplying one-half and Austria one-quarter.

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Imports of ski gloves amounted to $41.6 million in 1980 (down from $50.4 million in 1979). Taiwan and Korea each supplied over one-third in terms of value. Of the total, 89 percent entered duty free under the GSP.

Baseball glove imports almost tripled during 1976-80, growing from $17.7 million to $50.3 million. All U.S. manufacturers but one import the bulk of their product lines from Asia, where low labor rates provide the essential competitive ingredient. The gloves are usually designed to U.S. specifications. Korea supplied half the imports in 1980 and Taiwan, 45 percent. However, Korea exceeded the competitive-need limit of the GSP program in 1978 and again in 1980.

Imports of gloves designed for use in sports (except gloves for archery, baseball, soccer, golf, hockey, tennis, or skiing) quadrupled during 1976-80, soaring from $2.7 million to $10.7 million. This growth reflects increased participation in sports and the successful marketing of specialized gloves. Imports were already supplying over 80 percent of the market by 1976. The competitive advantage enjoyed by nations with low labor rates is reflected in the dramatic shift in the sources of imports between 1976 and 1980. During that period, imports from Japan dropped from $1.2 million to $1.0 million, while imports from Korea and Taiwan together climbed from $0.7 million to $7.2 million. The shift was caused by rising wage rates in Japan in comparison with those in Korea and Taiwan and by the implementation of the GSP. Japan's share of U.S. imports fell from 43 percent to 9 percent during 1976-80. Korea was the leading supplier in 1980, accounting for 40 percent, followed by Taiwan with 28 percent. Developing countries supplied 84 percent of miscellaneous sports glove imports in 1980, with 58 percent of all imports entering duty free under the GSP. Korea lost GSP eligibility in 1980 after supplying 60 percent of the imports in 1979.

Imports of baseballs and softballs tripled during 1976-80, from $10.7 million to $36.3 million, reflecting particularly the rising popularity of softball. Haiti supplied 83 percent of the imports in 1980, virtually all of which entered under TSUS item 807.00. Another 7 percent entered under TSUS item 807.00 from other Caribbean nations. Ten percent entered duty free under the GSP, primarily from Taiwan and Korea.

The demand for roller skates in the United States rose sharply in 1979 and 1980, picking up where demand for skateboards left off. In response, imports of roller skates, which averaged only $0.9 million annually during 1976-78, increased to $18.2 million in 1979 and $56.6 million in 1980. Taiwan supplied 83 percent of the imports in 1980.

Ice skating also experienced a resurgence in popularity during 1978-80. Imports of ice-skate outfits 1/ more than doubled during 1976-80, from $5.2 million to $13.8 million. Canada was the dominant supplier in 1980, accounting for 91 percent of the imports. Only 5 percent entered duty free under the GSP; all were from Taiwan.

Imports of playground, gymnasium, gymnastic, and exercise equipment were fairly stable during 1977-80, ranging from $20 million to $27 million each

1/ Ice-skates with footwear permanently attached.

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year (table 7). Taiwan was the leading supplier in 1980, furnishing over half the imports. Finland provided 13 percent, followed by Spain with a 9-percent share and Canada with 7 percent. Developing nations accounted for 56 percent of the imports, but only 4 percent entered duty free under the GSP because Taiwan had previously exceeded the competitive need limit for TSUS item 735.20. The imports from Finland tend to be of especially high quality.

The International Market

International market profile

Sporting goods are basically luxury items; foreign demand depends on the availability of discretionary income. Hence, the EEC, Canada, Scandinavia, and Japan are the largest foreign markets for sporting goods. On a per capita basis, Australia, South Africa, and Venezuela are also large markets. Many developing nations place high tariffs on luxury items such as sporting goods in order to preserve scarce foreign exchange for items more essential to the development process.

U.S. manufacturers of sporting goods are most competitive in foreign markets in items whose production processes are relatively capital intensive. Consequently, the United States fares poorly in overseas markets for labor-intensive items such as sports gloves, nets, and balls, but does well in the export of high-quality golf, tennis, fishing, ski, and exercise equipment. Often, U.S. brand names associated with high quality will sell goods despite prices somewhat higher than those of the local competitors. On the other hand, several U.S. sports, such as archery and football, are not played extensively outside this country, severely limiting the foreign market potential. U.S. exports sometimes suffer when producers enter contracts with agents who do not know how to market the firms' products. In contrast, U.S. companies occasionally establish manufacturing sites overseas to escape tariff barriers and to adapt the products and marketing strategy to the tastes of the local market.

U.S. exports

The volume of U.S. exports more than doubled during 1976-80, from $153 million to $337 million (table 2), compared with the 63-percent increase in imports during the period. The share of U.S. producers' shipments accounted for by exports increased from 7 percent to 12 percent during 1976-80. Golf equipment accounted for 27 percent of U.S. exports in 1980; tennis equipment provided 10 percent; fishing tackle, 9 percent; baseball and softball equipment, bowling equipment, and snow skis, 7 percent each; playground, gymnasium, gymnastic, and exercise equipment, 6 percent; and roller skates, 5 percent. The three largest markets for U.S. exports kept their relative positions throughout 1976-80, with Japan leading and holding a 24-percent share in 1980 followed by Canada with 13 percent and the United Kingdom with 8 percent (table 22).

Fishing tackle.--Exports of fishing tackle grew by 67 percent during 1976-80, with most of the increase occurring in 1979 and 1980 (table 3).

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exports rose from $17.5 million to $29.3 million during the period, and their share of producers' shipments increased from 7 percent to 8 percent. Although Canada remained the leading customer during the period, its share of U.S. exports dropped from 38 percent to 27 percent, while the share of second-place Japan jumped from 11 percent to 17 percent (table 23).

Rods and reels together accounted for just one-quarter of exports of fishing tackle in 1980. Japan was the chief customer for rod exports ($4 million), taking 18 percent, followed by Canada and Sweden with 16 percent each. Canada bought one-quarter of the reels, which totaled $3.7 million, Australia and South Africa took 12 percent each, and Japan took 11 percent. Canada was also the chief customer for the remaining types of fishing tackle ($21.7 million), accounting for 27 percent, followed by Japan with 17 percent.

The United States finds competition in foreign markets from low-cost rods from Taiwan and well-made reels from Japan and Sweden. Norway makes preferred fish hooks.

Golf equipment.--Exports of golf equipment dipped from $55.2 million in 1976 to $52.3 in 1977 and then nearly doubled, rising to $92.2 million in 1980 (table 4). The share of producers' shipments accounted for by exports grew from 10 percent to 22 percent during 1976-80. Finished clubs accounted for 59 percent of total golf equipment exports in 1980, with parts of clubs making up 21 percent and balls, 14 percent.

Japan consistently purchases over half of U.S. exported golf equipment. The British Commonwealth is the only other significant market for golf equipment. In developing countries, the number of people who can afford to play golf is small, and in Europe, land for golf courses is scarce. Japan accounted for 51 percent of U.S. exports in 1980, the United Kingdom bought 17 percent, and Canada took 8 percent (table 24). Sales to Japan dipped from $31.9 million in 1976 to $29.2 million in 1977 primarily because the construction of golf courses was halted and because a Japanese golf industry was emerging. Favorable exchange rates and solid marketing efforts encouraged exports to rebound to $42.7 million the following year and to $53.7 million in 1979.

Exports of golf clubs slipped from $33.5 million in 1976 to $31.8 million in 1977 before nearly doubling to $54.1 million in 1980. Japan accounted for 63 percent of U.S. exports in 1980, followed by the United Kingdom with 11 percent, South Africa with 5 percent, and Canada with 4 percent.

Exports of parts of golf clubs more than doubled during 1976-80, rising from $8.2 million to $19 million. The chief market in each year was Japan, which purchased 42 percent of U.S. exports in 1980. The second leading customer was the United Kingdom with 23 percent, followed by Canada with 12 percent, Mexico with 9 percent, and Australia with 6 percent. Most of the exports to Mexico were returned to the United States as finished clubs under TSUS item 806.30.

During 1976-80, exports of golf balls soared from $2.1 million to $12.5 million. The United Kingdom and Japan each bought over one-third of the exports in 1980, and Canada took 9 percent.

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Exports of golf equipment other than balls, clubs, and parts of clubs, actually fell by 40 percent during 1976-80, from $11.4 million to $6.5 million. Canada was the chief customer in 1980, taking one-third of the exports, followed by United Kingdom and Japan with 14 percent each.

Tennis equipment.--Despite the sluggish domestic market, U.S.-made tennis equipment is selling quite well overseas to quality-conscious consumers, as exports increased nearly fourfold during 1976-80, from $7.3 million to $35.3 million. The foreign markets have become a major contributor to the health of the industry, as the share of U.S. producers' shipments accounted for by exports rose from 7 percent to 30 percent during 1976-80 (table 5). Although Japan and West Germany were the top customers of exports of tennis equipment in 1980, taking 19 percent and 11 percent, respectively, Canada, Mexico, France, Singapore, Austria, and the United Kingdom each purchased between 5 and 7 percent (table 25). This is indicative of the widespread appeal of U.S.-made tennis equipment.

Rackets made up 61 percent of the exports of tennis equipment in 1980, balls accounted for 10 percent, and other tennis equipment, for 29 percent. Much of the "growth" in exports can be attributed to the increase in the average unit value of rackets, which rose from $8.73 in 1978 to $21.49 in 1980. The top racket customers in 1980 were Japan with a 24-percent share, Singapore with 9 percent, France with 8 percent, and Canada, Mexico, West Germany, Austria, Switzerland, and Hong Kong with between 4 and 6 percent each. The principal markets for tennis balls were the United Kingdom, Canada, and Japan with shares of 17, 15, and 10 percent, respectively. West Germany was the leading market for other tennis equipment, taking 23 percent, followed by Japan with 9 percent and Ireland with 8 percent. Belgium and Japan make top-of-the-line rackets and provide the stiffest competition at the upper end of the market, while Taiwan dominates the low end. The United Kingdom, Ireland, and Australia make balls which compete with the U.S. product in foreign markets.

Other sporting goods.--Exports of sporting goods other than fishing tackle or golf or tennis equipment increased more than one and a half times during 1976-80, from $73 million to $180 million. The share of producers' shipments accounted for by exports nearly doubled, rising from 5 percent to 9 percent (table 6). The leading export markets for these products in 1980 were Canada (15 percent), Japan (12 percent), and West Germany and Haiti (9 percent each) (table 26).

Exports of baseball and softball equipment totaled $23.1 million in 1980. Haiti accounted for 69 percent of the exports in 1980, with another 9 percent going to Honduras, with virtually all the exports consisted of baseball and softball cores to be reexported to the United States after leather covers were sewn on. The chief end-use customers were Canada and Venezuela, accounting for 5 percent each, and Japan, accounting for 3 percent.

Exports of bowling equipment reached $23.8 million in 1980. Nearly one-quarter of the exports went to West Germany; Japan accounted for 13 percent, Canada, for 11 percent, and Saudi Arabia, for 9 percent. West Germany has a large U.S. military population, and Saudi Arabia has an influential U.S. labor force on long-term contacts; both add significantly to the local demand for bowling equipment.

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In 1980, exports of snow skis totaled $21 million, compared with $12.7 million in 1978. Japan accounted for 30 percent of U.S. exports in 1980, followed by West Germany with 22 percent, Switzerland with 19 percent, Canada with 7 percent, and France with 6 percent. Although U.S.-made skis are priced nigher than Japanese ani European skis, their high quality and the good marketing efforts of U.S. producers have generated foreign demand. Austria and France are chief among the many foreign competitors for the overseas ski market.

Exports of playground, gymnasium, gymnastic, and exercise equipment reached $21.1 million in 1980. Venezuela and Canada each purchased 14 percent of the total; the United Kingdom, 13 percent; Japan, 9 percent; Saudi Arabia, 7 percent; and Mexico and Australia, 6 percent each. Taiwan, West Germany, and Finland provide the principal competition in the export market.

Exports of roller skates nearly tripled from 1979 to 1980, rising from $6.9 million to $20.5 million, indicating that the sport, which experienced a renaissance in California after the introduction of the urethane wheel, has caught on overseas. Mexico topped the foreign markets, taking 30 percent of exports in 1980. Sweden was second with 10 percent, followed by Canada with 9 percent and West Germany and Japan with 8 percent each.

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Appendix A

Part 3, Subparts B and D, Schedule 7, of the Tariff Schedules of the United Stated Annotated (1981) and Staged Rates of Duty

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GSP	Item	Stat. Suffix	Articles	Units of Quantity	Rates of Duty 1	Rates of Duty LDDC	Rates of Duty 2
			Subpart B. - Fishing Tackle				
			Subpart B headnote: 1. This subpart does not cover -- (i) fish netting and fishing nets other than fish landing nets (see part 4C of schedule 3); (ii) feathers for artificial flies (see part 15D of schedule 1); (iii) fishing guns (see subpart A of this part); or (iv) watercraft or other transportation equipment (see part 6 of schedule 6).				
			Fish hooks, including snelled hooks:				
A	731.05	00	Snelled hooks	X	6.5% ad val.	5% ad val.	55% ad val.
A	731.06	00	Other	X	12.8% ad val.	6% ad val.	45% ad val.
A	731.10	00	Fishing baskets or creels	No	6.5% ad val.	5% ad val.	45% ad val.
	731.15		Fishing rods, and parts thereof		14.3% ad val.	7.6% ad val.	55% ad val.
		20	Fishing rods	No.			
		40	Parts	X			
			Fishing reels and parts thereof:				
			Reels:				
A	731.20	00	Valued not over $2.70 each	No	19.6% ad val.	9.2% ad val.	55% ad val.
	731.22	00	Valued over $2.70 but not over $8.45 each	No	54¢ each	30¢ each	55% ad val.
A	731.24	00	Valued over $8.45 each	No	6.8% ad val.	4.9% ad val.	55% ad val.
A	731.26	00	Parts	X	11.5% ad val.	5.4% ad val.	55% ad val.
A	731.30	00	Fishing casts or leaders	Doz	14.9% ad val.	7% ad val.	55% ad val.
			Fishing line put up and packaged for retail sale:				
	731.40	00	Of cotton	X	9% ad val.	5.8% ad val.	40% ad val.
A	731.42	00	Of flax	X	6% ad val.	4.4% ad val.	40% ad val.
A	731.44	00	Other	X	11.5% ad val.	5.4% ad val.	65% ad val.
A	731.50	00	Fish landing nets	No	10.6% ad val.	5% ad val.	40% ad val.
			Equipment designed for sport fishing, fishing tackle, and parts of such equipment and tackle, all the foregoing not specially provided for:				
	731.65	00	Artificial baits and flies	Doz	11.6% ad val.	9% ad val.	55% ad val.
A	731.70	00	Other	X	11.6% ad val.	9% ad val.	55% ad val.

Note: For explanation of the symbol "A" or "A*" in the column entitled "GSP", see general headnote 3(c).

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GSP	Item	Stat. Suf-fix	Articles	Units of Quantity	Rates of Duty 1	LDDC	2
			Subpart D. - Games and Sporting Goods				
			Subpart D headnotes:				
			1. This subpart covers equipment designed for indoor or outdoor games, sports, gymnastics, or athletics, but does not cover -- (i) arms and ammunition or fishing tackle (see subparts A and B of this part); (ii) footwear, other than footwear with skates permanently attached (see part 1A of this schedule); (iii) headwear (see part 1B of this schedule); (iv) body-supporting garments provided for in part 6D of schedule 3; (v) other wearing apparel, other than specially designed protective articles such as, but not limited to, gloves, shoulder pads, leg guards, and chest protectors; (vi) automobiles, motorcycles, or other vehicles; canoes, boats, or other watercraft; or aircraft (see part 6 of schedule 6); or (vii) luggage (see part 1D of this schedule).				
			2. For the purposes of this subpart -- (a) the term "in sets" (item 734.30), as used with regard to table-tennis equipment means at least 2 but not more than 4 bats, 1 net with requisite clamps and supports, and not over 6 balls, packaged together as a unit in immediate containers of a type used in retail stores.				
			Bagatelle, billiard, and pool equipment (except tables), and parts thereof:				
A	734.05	00	Balls	No.....	17.1% ad val.	8.2% ad val.	50% ad val.
A*	734.10	00	Other	X.....	5.1% ad val.		33-1/3% ad val.
A*	734.15	00	Chess, checkers, pachisi, backgammon, darts, and other games played on boards of special design, all the foregoing games and parts thereof (including their boards); mah-jong, and dominoes; any of the foregoing games in combination with each other, or with other games, packaged together as a unit in immediate containers of a type used in retail sales; poker chips and dice	X.....	9% ad val.	5.8% ad val.	50% ad val.

Note: For explanation of the symbol "A" or "A*" in the column entitled "GSP", see general headnote 3(c).

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GSP	Item	Stat. Suffix	Articles	Units of Quantity	Rates of Duty 1	LDDC	2
A*	734.20		Game machines, including coin or disc operated game machines and including games having mechanical controls for manipulating the action, and parts thereof	.....	5.1% ad val.	3.9% ad val.	35% ad val.
		10	Video games and parts thereof	X			
			Other:				
		15	Coin or disc operated game machines: Pinball machines and bell-type machines and consoles	X			
		30	Other	X			
		40	Other	X			
A*	734.25	00	Playing cards	Pack.....	1.7¢ per pack + 1.7% ad val.	0.8¢ per pack + 0.8% ad val.	10¢ per pack + 20% ad val.
			Table-tennis equipment (except tables), and parts thereof:				
A	734.30	00	In sets	X.....	7.3% ad val.	5.1% ad val.	30% ad val.
			Not in sets:				
A	734.32	00	Balls	No.....	9% ad val.	5.8% ad val.	30% ad val.
A*	734.34	00	Other	X.....	7.3% ad val.	5.1% ad val.	30% ad val.
			Tables specially designed for games:				
A	734.40	00	Of wood	X.....	7.3% ad val.	5.1% ad val.	33-1/3% ad val.
A	734.42	00	Other	X.....	9.5% ad val.		45% ad val.
A	734.45	00	Archery equipment, and parts thereof	X.....	7.2% ad val.	3.4% ad val.	35% ad val.
			Badminton equipment, and parts thereof:				
	734.48	00	Nets of cotton, whether or not in badminton sets	No. or Lb.	11.9% ad val.	5.6% ad val.	30% ad val.
A*	734.51		Other	.....	8% ad val.	5.6% ad val.	30% ad val.
		10	In sets	No.			
			Other:				
		20	Rackets and racket frames	No.			
		30	Other	X			
			Baseball equipment, and parts thereof:				
A	734.54	00	Baseball and softball gloves and mitts	No.....	12.8% ad val.	6% ad val.	30% ad val.
A*	734.56		Other	.....	6.4% ad val.	3% ad val.	30% ad val.
		10	Baseballs	No.			
		15	Softballs	No.			
		20	Batting gloves	No.			
		45	Other	X			
A	734.60	00	Croquet equipment, and parts thereof	X.....	6.8% ad val.	3.2% ad val.	30% ad val.
	734.65	00	Curling stones, and parts thereof	X.....	Free		Free
			Football, soccer, and polo equipment, and parts thereof:				
A	734.70		Balls	.....	3.8% ad val.	Free	30% ad val.
		20	Footballs	No.			
		40	Other	No.			
A	734.71	00	Polo mallets and soccer guards	X.....	3.8% ad val.	3.1% ad val.	30% ad val.
A	734.72	00	Other	X.....	6.9% ad val.	6.9% ad val.	30% ad val.

Note: For explanation of the symbol "A" or "A*" in the column entitled "GSP", see general headnote 3(c).

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GSP	Item	Stat. Suf-fix	Articles	Units of Quantity	Rates of Duty 1	Rates of Duty LDDC	Rates of Duty 2
			Golf equipment, and parts thereof:				
A	734.75		Balls and parts thereof	.....	5.1% ad val.	2.4% ad val.	30% ad val.
		20	Balls	Doz.			
		40	Other	Doz.			
A	734.77		Other	.....	6.9% ad val.	4.9% ad val.	30% ad val.
		20	Clubs	No.			
		40	Parts of clubs	X			
		60	Golf gloves	Doz.			
		80	Other	X			
A	734.80		Ice-hockey and field-hockey equipment (except skates), and parts thereof	.....	3.4% ad val.	Free	30% ad val.
		10	Ice-hockey sticks	No.			
		20	Other	X			
			Lawn-tennis equipment, and parts thereof:				
A	734.85	00	Balls	No.....	5.6% ad val.	4.2% ad val.	30% ad val.
			Rackets, whether or not strung:				
A	734.86	00	Not strung	No.....	5.1% ad val.	3.9% ad val.	30% ad val.
A*	734.87	00	Strung	No.....	5.3% ad val.		30% ad val.
A	734.88		Other	.....	3.8% ad val.	3.1% ad val.	30% ad val.
		20	Tennis racket string	Ft.			
		50	Other	X			
			Skates (including footwear with skates permanently attached), and parts thereof:				
A*	734.90	00	Roller skates, and parts thereof	X.....	3.8% ad val.	Free	20% ad val.
			Ice-skates, and parts thereof:				
A	734.91	00	Footwear with ice-skates permanently attached	Prs.....	9% ad val.	5.8% ad val.	20% ad val.
A	734.93		Other	.....	4.3% ad val.	2% ad val.	20% ad val.
		20	Ice-skates without footwear permanently attached	Prs.			
		40	Ice-skate blades and other parts	X			
			Skis and ski equipment, snowshoes, sleds, and toboggans, all the foregoing and parts thereof:				
A	734.95	00	Toboggans	No.....	3.8% ad val.	Free	33-1/3% ad val.
			Skis and snowshoes:				
A	735.01	00	Cross-country skis	Prs.....	6.9% ad val.	3.5% ad val.	33-1/3% ad val.
A	735.02		Other	.....	7.3% ad val.	5.1% ad val.	33-1/3% ad val.
		15	Snow skis	Prs.			
		50	Other	Prs.			
	735.03	00	Bobsleds and luges of a kind used in international competition	No.....	Free		Free
			Other:				
A	735.04	00	Cross-country ski equipment and parts thereof	X.....	7.6% ad val.	3.5% ad val.	45% ad val.
A	735.06		Other	.....	8.1% ad val.	5.5% ad val.	45% ad val.
		25	Ski bindings, and parts thereof	X			
		45	Ski poles, and parts thereof	X			
		60	Ski gloves	Prs.			
		80	Other	X			

Note: For explanation of the symbol "A" or "A*" in the column entitled "GSP", see general headnote 3(c).

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GSP	Item	Stat. Suffix	Articles	Units of Quantity	Rates of Duty 1	Rates of Duty LDDC	Rates of Duty 2
A*	735.07	00	Boxing gloves, and other gloves, not provided for in the foregoing provisions of this subpart, specially designed for use in sports	X	6.9% ad val.	4.9% ad val.	30% ad val.
			Beach balls, play balls, toy balls, and other balls for games or sports, not provided for in the foregoing provisions of this subpart:				
A*	735.09		Inflatable balls		10.5% ad val.	6% ad val.	30% ad val.
		20	Basketballs	No.			
		60	Volleyballs	No.			
		90	Other	No.			
A	735.10	00	Noninflatable hollow balls not over 7.5 inches in diameter	No.	15.1% ad val.	7.8% ad val.	70% ad val.
A	735.11	00	Sponge rubber balls	No.	7.5% ad val.	6.9% ad val.	70% ad val.
A	735.12		Other		6.9% ad val.	4.9% ad val.	30% ad val.
		20	Bowling balls	No.			
		40	Other	X			
A	735.15	00	Underwater breathing devices designed as a complete unit to be carried on the person and not requiring attendants	X	3.4% ad val.	Free	27.5% ad val.
A	735.17	00	Lacrosse sticks	No.	2.6% ad val.	Free	30% ad val.
A	735.18	00	Skeet targets	Doz.	3.8% ad val.	Free	20% ad val.
A*	735.20		Puzzles; game, sport, gymnastic, athletic, or playground equipment; all the foregoing, and parts thereof, not specially provided for		9% ad val.	5.8% ad val.	40% ad val.
		20	Puzzles and parts thereof	X			
		25	Nets for games or sports, not specially provided for	Lb.			
		30	Raquetball rackets	No.			
		32	Squash rackets	No.			
			Skateboards and parts thereof:				
		38	Skateboards	No.			
			Parts:				
		42	Decks	No.			
		44	Other	X			
			Other:				
		55	Playground, gymnasium, gymnastic and other exercise equipment	X			
		57	Other	X			

Note: For explanation of the symbol "A" or "A*" in the column entitled "GSP", see general headnote 3(c).

Sporting goods. Pre-MTN rate and staged rate modifications, by TSUS items, 1980-87

TSUS item No.	Pre-MTN col. 1 rate of duty 1/	Rates of duty 2/, effective with respect to articles entered on and after Jan. 1--							
		1980	1981	1982	1983	1984	1985	1986	1987
731.05	12.5%	9.5%	6.5%	5%	5%	5%	5%	5%	5%
731.06	15%	13.9%	12.8%	11.6%	10.5%	9.4%	8.3%	7.1%	6%
731.10	12.5%	9.5%	6.5%	5%	5%	5%	5%	5%	5%
731.15	16.5%	15.4%	14.3%	13.2%	12.1%	10.9%	9.8%	8.7%	7.6%
731.20	23%	21.3%	19.6%	17.8%	16.1%	14.4%	12.7%	10.9%	9.2%
731.22	62.5¢ each	58¢ each	54¢ each	50¢ each	46¢ each	42¢ each	38¢ each	34¢ each	30¢ each
731.24	7.5%	7.2%	6.9%	6.5%	6.2%	5.9%	5.6%	5.2%	4.9%
731.26	13.5%	12.5%	11.5%	10.5%	9.5%	8.4%	7.4%	6.4%	5.4%
731.30	17.5%	16.2%	14.9%	13.6%	12.3%	10.9%	9.6%	8.3%	7%
731.40	10%	9.5%	9%	8.4%	7.9%	7.4%	6.9%	6.3%	5.8%
731.42	6.5%	6.2%	6%	5.7%	5.5%	5.2%	4.9%	4.7%	4.4%
731.44	13.5%	12.5%	11.5%	10.5%	9.5%	8.4%	7.4%	6.4%	5.4%
731.50	12.5%	11.6%	10.6%	9.7%	8.8%	7.8%	6.9%	5.9%	5%
731.65	12.5%	12.1%	11.6%	11.2%	10.8%	10.3%	9.9%	9.4%	9%
731.70	12.5%	12.1%	11.6%	11.2%	10.8%	10.3%	9.9%	9.4%	9%
734.05	20%	18.5%	17.1%	15.6%	14.1%	12.6%	11.2%	9.7%	8.2%
734.10	8%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%
734.30	8%	7.6%	7.3%	9.6%	6.6%	6.2%	5.8%	5.5%	5.1%
734.32	10%	9.5%	9%	8.4%	7.9%	7.4%	6.9%	6.3%	5.8%
734.34	8%	7.6%	7.3%	6.9%	6.6%	6.2%	5.8%	5.5%	5.1%
734.40	8%	7.6%	7.3%	6.9%	6.6%	6.2%	5.8%	5.5%	5.1%
734.42	9.5%	9.5%	9.5%	8.6%	7.6%	6.7%	5.7%	4.8%	3.8%
734.45	8.5%	7.9%	7.2%	6.6%	6%	5.3%	4.7%	4%	3.4%
734.48	14%	13%	11.9%	10.9%	9.8%	8.8%	7.7%	6.7%	5.6%
734.51	14%	11%	8%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%
734.56	15%	6.9%	6.4%	5.8%	5.3%	4.7%	4.1%	3.6%	3%
734.60	7.5%	7.4%	6.8%	6.2%	5.6%	5%	4.4%	3.8%	3.2%
734.70	5%	4.7%	3.8%	3.1%	2.5%	1.9%	1.3%	0.6%	Free
734.71	4%	3.9%	3.8%	3.7%	3.6%	3.4%	3.3%	3.2%	3.1%
731.72	7.5%	7.2%	6.9%	6.5%	6.2%	5.9%	5.6%	5.2%	4.9%
734.75	6%	5.6%	5.1%	4.7%	4.2%	3.8%	3.3%	2.9%	2.4%
734.77	7.5%	7.2%	6.9%	6.5%	6.2%	5.9%	5.6%	5.2%	4.9%
734.80	4.5%	3.9%	3.4%	2.8%	2.3%	1.7%	1.1%	0.6%	Free
734.85	6%	5.8%	5.6%	5.3%	5.1%	4.9%	4.7%	4.4%	4.2%
734.86	5.5%	5.3%	5.1%	4.9%	4.7%	4.5%	4.3%	4.1%	3.9%
734.87	8.5%	5.3%	5.3%	5.3%	5.3%	5.3%	5.3%	5.3%	5.3%
734.88	4%	3.9%	3.8%	3.7%	3.6%	3.4%	3.3%	3.2%	3.1%
734.90	5%	4.4%	3.8%	3.1%	2.5%	1.9%	1.3%	0.6%	Free
734.91	10%	9.5%	9%	8.4%	7.9%	7.4%	6.9%	6.3%	5.8%
734.93	5%	4.6%	4.3%	3.9%	3.5%	3.1%	2.8%	2.4%	2%
734.95	5%	4.4%	3.8%	3.1%	2.5%	1.9%	1.3%	0.6%	Free
735.01	8%	7.4%	6.9%	6.3%	5.8%	5.2%	4.6%	4.1%	3.5%
735.02	8%	7.6%	7.3%	6.9%	6.6%	6.2%	5.8%	5.5%	5.1%
735.04	9%	8.3%	7.6%	6.9%	6.3%	5.6%	4.9%	4.2%	3.5%
735.06	9%	8.6%	8.1%	7.7%	7.3%	6.9%	6.4%	5.9%	5.5%
735.07	3.5%	7.2%	6.9%	6.5%	6.2%	5.9%	5.6%	5.2%	4.9%
735.09	12%	11.3%	10.5%	9.8%	9%	8.3%	7.5%	6.8%	6%
735.10	17.5%	16.3%	15.1%	13.9%	12.7%	11.4%	10.2%	9%	7.8%
735.11	13.5%	10.5%	7.5%	6.9%	6.9%	6.9%	6.9%	6.9%	6.9%
735.12	7.5%	7.2%	6.9%	6.5%	6.2%	5.9%	5.6%	5.2%	4.9%
735.15	4.5%	3.9%	3.4%	2.8%	2.3%	1.7%	1.1%	0.6%	Free
735.17	3.3%	3.1%	2.6%	2.2%	1.8%	1.3%	0.9%	0.4%	Free
735.18	5%	4.4%	3.8%	3.1%	2.5%	1.9%	1.3%	0.6%	Free
735.20	10%	9.5%	9%	8.4%	7.9%	7.4%	6.9%	6.3%	5.8

1/ Effective Jan. 1, 1972-Dec. 31, 1979, except for bobsleds and luges of a kind used in international competition (TSUS item 735.05), for which the 9 percent ad valorem duty was eliminated by Public Law 95-170, effective Nov. 12, 1977.
2/ The symbol "%" indicates percent ad valorem.

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Appendix B

Concordance of TSUS Numbers, Schedule B Numbers, SIC Numbers, SITC Numbers, and CCCN Numbers

BEST DOCUMENT AVAILABLE

Sporting goods: TSUS item numbers, Schedule B numbers, SIC numbers, and CCCN numbers included in this commodity group

TSUS item No.	Schedule B No.	SIC No.	SITC No.	CCCN No.
731.05	731.0100 (pt.)	3949 (pt.)	894.71 (pt.)	97.07 (pt.)
731.06	731.0100 (pt.)	3949 (pt.)	894.71 (pt.)	97.07 (pt.)
731.10	731.6100 (pt.)	3949 (pt.)	894.71 (pt.)	97.07 (pt.)
731.15	731.1600 (pt.)	3949 (pt.)	894.71 (pt.)	97.07 (pt.)
	731.6100 (pt.)			
731.20	731.1900 (pt.)	3949 (pt.)	894.71 (pt.)	97.07 (pt.)
731.22	731.1900 (pt.)	3949 (pt.)	894.71 (pt.)	97.07 (pt.)
731.24	734.1900 (pt.)	3949 (pt.)	894.71 (pt.)	97.07 (pt.)
731.26	731.6100 (pt.)	3949 (pt.)	894.71 (pt.)	97.07 (pt.)
731.30	731.6100 (pt.)	3949 (pt.)	894.71 (pt.)	97.07 (pt.)
731.40	731.6100 (pt.)	3949 (pt.)	894.71 (pt.)	97.07 (pt.)
731.42	731.6100 (pt.)	3949 (pt.)	894.71 (pt.)	97.07 (pt.)
731.44	731.6100 (pt.)	3949 (pt.)	894.71 (pt.)	97.07 (pt.)
731.50	731.6100 (pt.)	3949 (pt.)	894.71 (pt.)	97.07 (pt.)
731.65	731.0100 (pt.)	3949 (pt.)	894.71 (pt.)	97.07 (pt.)
731.70	731.6100 (pt.)	3949 (pt.)	894.71 (pt.)	97.07 (pt.)
734.05	734.1100 (pt.)	3949 (pt.)	894.24 (pt.)	97.04 (pt.)
734.10	734.1100 (pt.)	3949 (pt.)	894.24 (pt.)	97.04 (pt.)
734.30	735.2585 (pt.)	3949 (pt.)	894.24 (pt.)	97.04 (pt.)
734.32	735.2585 (pt.)	3949 (pt.)	894.24 (pt.)	97.04 (pt.)
734.34	735.2585 (pt.)	3949 (pt.)	894.24 (pt.)	97.04 (pt.)
734.40	734.4320 (pt.)	3949 (pt.)	894.24 (pt.)	97.04 (pt.)
	734.4340 (pt.)			
734.42	734.4320 (pt.)	3949 (pt.)	894.24 (pt.)	97.04 (pt.)
	734.4340 (pt.)			
734.45	734.4500	3949 (pt.)	894.72 (pt.)	97.06 (pt.)
734.48	735.2585 (pt.)	3949 (pt.)	894.72 (pt.)	97.06 (pt.)
734.51	735.2585 (pt.)	3949 (pt.)	894.72 (pt.)	97.06 (pt.)
734.54	734.5500 (pt.)	3949 (pt.)	894.72 (pt.)	97.06 (pt.)
734.56	734.5500 (pt.)	3949 (pt.)	894.72 (pt.)	97.06 (pt.)
734.60	735.2585 (pt.)	3949 (pt.)	894.72 (pt.)	97.06 (pt.)
734.65	735.2585 (pt.)	3949 (pt.)	894.72 (pt.)	97.06 (pt.)
734.70	735.1340 (pt.)	3949 (pt.)	894.72 (pt.)	97.06 (pt.)
	735.1380 (pt.)			
734.71	735.2585 (pt.)	3949 (pt.)	894.72 (pt.)	97.06 (pt.)
734.72	735.2585 (pt.)	3949 (pt.)	894.72 (pt.)	97.06 (pt.)
734.75	734.7420	3949 (pt.)	894.72 (pt.)	97.06 (pt.)
	734.7480 (pt.)			
734.77	734.7440	3949 (pt.)	894.72 (pt.)	97.06 (pt.)
	734.7460			
	734.7480 (pt.)			
734.80	734.8000	3949 (pt.)	894.72 (pt.)	97.06 (pt.)
734.85	734.8420	3949 (pt.)	894.72 (pt.)	97.06 (pt.)
734.86	734.8440 (pt.)	3949 (pt.)	894.72 (pt.)	97.06 (pt.)
734.87	734.8440 (pt.)	3949 (pt.)	894.72 (pt.)	97.06 (pt.)
734.88	734.8460	3949 (pt.)	894.72 (pt.)	97.06 (pt.)
734.90	734.9000	3949 (pt.)	894.72 (pt.)	97.06 (pt.)
734.91	735.2585 (pt.)	3949 (pt.)	894.72 (pt.)	97.06 (pt.)
734.93	735.2585 (pt.)	3949 (pt.)	894.72 (pt.)	97.06 (pt.)
734.95	734.9860 (pt.)	3949 (pt.)	894.72 (pt.)	97.06 (pt.)

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Sporting goods: TSUS item numbers, Schedule B numbers, SIC numbers, and CCCN numbers included in this commodity group--Continued

TSUS item No.	Schedule B No.	SIC No.	SITC No.	CCCN No.
735.01 1/	734.9820 (pt.)	3949 (pt.)	894.72 (pt.)	97.06 (pt.)
735.02 2/	734.9820 (pt.)	3949 (pt.)	894.72 (pt.)	97.06 (pt.)
	734.9840			
	734.9860 (pt.)			
735.03 3/	734.9860 (pt.)	3949 (pt.)	894.72 (pt.)	97.06 (pt.)
735.04 4/	734.9860 (pt.)	3949 (pt.)	894.72 (pt.)	97.06 (pt.)
735.06 5/	734.9860 (pt.)	3949 (pt.)	894.72 (pt.)	97.06 (pt.)
735.07 6/	735.2585 (pt.)	3949 (pt.)	894.72 (pt.)	97.06 (pt.)
735.09	735.1320	3949 (pt.)	894.72 (pt.)	97.06 (pt.)
	735.1340 (pt.)			
735.10	735.1380 (pt.)	3949 (pt.)	894.72 (pt.)	97.06 (pt.)
735.11	735.1380 (pt.)	3949 (pt.)	894.72 (pt.)	97.06 (pt.)
735.12	735.1360	3949 (pt.)	894.72 (pt.)	97.06 (pt.)
	735.1380 (pt.)			
735.15	735.1500	3949 (pt.)	894.72 (pt.)	97.06 (pt.)
735.17	735.2585 (pt.)	3949 (pt.)	894.72 (pt.)	97.06 (pt.)
735.18	735.2585 (pt.)	3949 (pt.)	894.72 (pt.)	97.06 (pt.)
735.20 (pt.)	735.2520	3949 (pt.)	894.72 (pt.)	97.06 (pt.)
	735.2540			
	735.2551			
	735.2553			
	735.2555			
	735.2585 (pt.)			

1/ From TSUSA item 734.9610 on Jan. 1, 1980.
2/ From TSUS item 734.96 on Jan. 1, 1980.
3/ From TSUS item 734.98 on Jan. 1, 1980.
4/ From TSUS item 734.99 on Jan. 1, 1980.
5/ From TSUS item 734.99 on Jan. 1, 1980.
6/ From TSUS item 735.05 on Jan. 1, 1980.

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Appendix C

Compilation of U.S. Customs Service Rulings and Advice Related to Sporting Goods

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Compilation of U.S. Customs Service Rulings and
Advice Related to Sporting Goods

Fishing tackle

Line guides on fishing rods are parts of fishing rods, TSUSA item 731.1540 (T.D. 71-35(3)). Cork tubes under 18 inches long, with a center hole, are fishing rod handles, hence in TSUSA item 731.1540. Such tubes over 18 inches long are in TSUS item 220.20 (ORR Ruling 66-71). Fishing reel parts which are imported in the same shipment and designed to form a complete reel when attached are classified as a complete reel, TSUS item 731.20, -.22, or -.24. If the parts are imported in separate shipments, then they are parts of fishing reels, TSUS item 731.26 (T.D. 67-48(9)). A plug attached to a fishing reel is sports equipment, n.s.p.f., TSUSA item 735.2057, not fishing tackle, n.s.p.f., TSUS item 731.70 (T.D. 56516(76)). Fluorescent, flat plastic strips shaped like minnows are artificial bait, TSUS item 731.65 (ORR Ruling 573-69). Cork balls which are used as floats are not fishing tackle, n.s.p.f., TSUS item 731.70, but are, instead, cork articles, n.s.p.f., TSUS item 220.50, because they have many uses (C.I.E. 680166).

The following items have been ruled classifiable as fishing tackle, n.s.p.f., under TSUS item 731.70: down riggers used to drop lures to measured depths (not as winches, item 664.10); cotton net fish bags (not cotton net articles, n.s.p.f., item 386.04--T.D. 71-83(15)); tools containing a guillotine-type blade for humanely killing fish (T.D. 68-170(5)); rod and reel combinations for use in ice fishing (T.D. 66-190(6)); tuna fishing units, composed of "Hancyo" lines, sekiyamas, swivels, seizing wires, and hooks, all permanently combined (T.D. 56475(45)); fishing pole holders (T.D. 56475(46)); jointed bamboo fishing poles which are not made into rods (if unjointed, they are classified under item 222.05--T.D. 56382(17)); certain ice-fishing rigs (T.D. 56320(25)), retrievers or rollers designed to release snagged fishing line (ORR Ruling 344-69); nickel-silver salmon trolling snaps (T.D. 69-209(8)); and certain fishing spears (T.D. 56448(23)).

Golf equipment

Unfinished, rough-shaped golf club heads are classified as parts of golf clubs, TSUSA item 734.7740, rather than articles of wood, n.s.p.f., item 207.00 (ORR Ruling 422-71).

Tennis equipment

Catgut which is cut to a proper length and intended to be used as tennis racket string is classified as catgut, TSUS item 190.25 (TC 474.51). However, if the catgut has been both physically and chemically treated to fashion it specifically as tennis racket strings, and cut to specific lengths for use solely in stringing tennis rackets, then it becomes a "manufacture of catgut" and the eo nomine designation of general headnote 10(ij) does not apply. Such specifically processed catgut is classified as tennis racket string, TSUSA

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734.8820 (T.D. 66-157(18)). "Elascord," a 15-gauge string made of multifilament, continuously extruded manmade-fiber yarns, is classified as tennis-racket string, item 734.8820, when it is imported in 35-foot coils, but when in reels containing 660 feet, it is cordage of manmade fibers, item 316.60 (T.D. 56502(15)). Nylon string sold in bulk lots to manufacturers of tennis rackets is classified as net articles of manmade fibers, n.s.p.f., item 389.60. If such nylon string is packaged for retail sale in small quantities to the ultimate consumer, it is tennis racket string, item 734.8820 (C.D. 4699).

Tennis racket frames which are imported in a condition requiring numerous finishing operations are nevertheless classified as lawn-tennis rackets, not strung, item 734.86, rather than "other" tennis equipment and parts, item 734.88 (CLA-2:RCV:MA 052316 C).

The following articles have been held to be properly classifiable as lawn-tennis equipment, n.s.p.f. under TSUSA item 734.8850: gloves specially designed for use in tennis (instead of knit gloves of manmade fibers, item 704.85--C.D. 3827); automatic tennis machines which pitch and receive tennis balls (TC 492.23); rubberized fabric covers for tennis rackets (TC 492.233); and center straps for tennis nets (ORR Ruling 430-71).

Other sporting goods

Table-tennis equipment manufactured in a beneficiary developing country and packaged in sets with table-tennis balls manufactured in the People's Republic of China is classifiable under TSUS item 734.30; the balls are subject to the column 1 rate of duty, and the remaining equipment is subject to the column 1 rate of duty and may be eligible for duty-free treatment under the GSP (R:CV:S JLV 055524). Automatic training machines for table tennis are classified as "other" table-tennis equipment, item 734.34 (C.I.E. 2122/66). Replacement rubber squares used on table-tennis bats are also classifiable under item 734.34 (TC 465.23e).

Archery release devices are classifiable as archery equipment, item 734.45 (CLA-2:R:CV:MA 042553 LXL). Also falling under this classification are crossbows (ORR Ruling 74-0273), archery gloves (ORR Ruling 74-0264), and archery racks (TC 481.39c).

Baseball batting gloves, TSUS item 734.56, are distinguishable from "other" gloves designed for use in sports, item 735.07, by the fact that batting gloves have perforations on the backs of the fingers, they have velcro closures near the wrist, they are sold singly, and they are packaged and sold as batting gloves (CLA-2:R:CV:MA 052276 c). Automatic baseball pitching machines are also classified as "other" baseball equipment, item 734.56 (C.I.E. 955/67).

Rugby balls are classified as footballs, TSUSA item 734.7020, primarily because dictionaries frequently cite rugby as a definition for football. Soccer goalie gloves are football, soccer, and polo equipment, n.sp.f., item

734.72; not sports gloves, n.s.p.f., item 735.07. Combination kneecap guards and shin guards which can be used in either hockey or motorcycle racing are classified as hockey equipment, item 734.8020, not "other" sporting goods, item 735.20 (CLA-2:RRUCGC 064152 ICS).

Footwear dedicated toward the assembly of roller skates is classifiable as parts of footwear with skates permanently attached, item 734.90; not as footwear under Schedule 7, part 1, subpart A (CLA:RRUCGC 061840 C). On the other hand, shoes designed exclusively for use with removable roller skates are classifiable under schedule 7, part 1, subpart A (CLA-2:R:CV:MA 062372 C).

Vinyl mittens, designed for children, which have the features cited in Customs Decision 4023, i.e.:

1. A hook and clasp to hold the gloves together;

2. An extra piece of vinyl stitched along the thumb portion to meet the stress caused by the flexing of the knuckles when the skier grasps the ski pole;

3. An extra piece of red colored vinyl with padding reinforcement and inside stitching, which is securely stitched across the middle of the glove where the knuckles bend and cause stress; and

4. Cuffs with an elastic gauntlet to hold the glove firmly around the wrist, so as to be waterproof, and to keep it securely on the hand,

are classified as ski gloves, item 735.0660, even though the mittens are not functional for use in the sport of skiing (CLA-2-EEUCGC 061029 C). Cross-country ski gloves, on the other hand, are classified as "other" cross-country ski equipment, item 735.04, and have the following characteristics (CLA-2:R:CV:MA 055041 C):

1. Lightweight.

2. Back of hand made of breathable material with or without perforations.

3. Wrist tightener to hold the glove firmly around the wrist and to prevent snow from entering.

4. Reinforcement on palm and along the thumb portion of the glove.

Grass skis are classified as "other" skis and snowshoes, item 735.0250, not sporting goods, n.s.p.f., item 735.2057 (CLA-2:RRUCGC 061608 C). Nylon ski-binding covers (ORR Ruling 775-70) and rubber ski ties (ORR Ruling 74-0134) are both classified as "other" ski equipment, item 735.0680.

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Shooting gloves (ORR Ruling 970-70), motocross gloves (C.D. 4641), and vinyl racing gloves (ORR Ruling 745-70) are all classified as gloves specially designed for use in sports, n.s.p.f., item 735.07. Unfinished boxing gloves, requiring stuffing, stitching, and laces, are also classifiable as sports gloves, n.s.p.f., item 735.07 (TC 492.24).

Push balls have a rubber bladder and canvas cover. Some are as large as 6 feet in diameter and weigh 40 pounds. They are used for mass recreation activity. Pumpkin balls are made of plastic and have a face painted on. They are used for play. Both are classifiable as balls for sports and play, n.s.p.f., item 735.0940 (ORR Rulings 72-0215 and 75-0084, respectively). Studsi balls are tennis ball cores without the felt covering. They are chiefly used to practice tennis strokes against a wall. Since they are not used in the ordinary game of tennis, they are classified as "noninflatable nollow balls, item 735.1220, because general headnote 10(h) of the TSUS provides, "Unless the context requires otherwise, a tariff description for an article covers such article . . . whether finished or not finished" (T.P. 56190(27)). Wooden balls and steel balls for the game of Petanque (ORR Ruling 632-66) and plastic balls filled with water for the game of Bocce (T.D. 60-157(4)) are classified as balls for games and sports, n.s.p.f., item 735.1240.

The following products are all classifiable under TSUS item 735.20, sport, gymnastic, athletic, or playground equipment; all the foregoing and parts thereof, n.s.p.f.: protective cups, but not athletic supporters, even when they are combined with protective cups (CLA-2:R:CV:MC 059008 EA); nylon racquetball strings (CLA-2:R:CV:MA 053907 C); natural gut strings, 17 inches, packed for retail sale, for squash rackets; cricket equipment (T.D. 60-157(14)), cricket matting, a carpet-like surface, 22 yards by 8 feet, used as an outdoor playing surface in cricket matches (T.D. 56545(15)); gymnasium mats (T.D. 69-12(14)); shooting mats, used by firearms sportsmen; judo mats (T.D. 60-7(63)); certain mountain climbing tools, specifically crampons, rock hammers, and ice axes (T.D. 56490(51)); mountain-climbing ropes (C.S.D. 79-113); rough-turned, unfinished bowling pins (T.D. 66-2-7(22)); bowling alley gutter sets (T.D. 56178(31)); "Auto-cycle," a combination tricycle and merry-go-round (TC 492-123); slides and swings (C.I.E. 1151/67); climbing apparatus for physical education (C.I.E. 1617/64); bicycle and row exercisers (C.I.E. 1027/64); "Aquaskims," polyfiber pontoons which are fitted onto the user's feet and enable the user to stand, walk, or ski on water (ORR Ruling 72-0221); "Floppers," plastic foras with handholds and a stabilizing fin, used in water sports (ORR Ruling 631-71); windsurfs, essentially surfboards equipped with sails (CLA-2:R:CV:MA 062052 KDJ); DN class iceboats, which consist of a sail, a body, and two runners which allow the vehicle to sail across ice (ORR Ruling 230-71); "Aquazepps," a torpedo-shaped propulsion unit used primarily by skin divers (ORR Ruling 898-70); diving boards (C.I.E. 659/67); surfboards (T.D. 56490(50)); racing oars, sculls, blades, and sweeps designed to be used with racing shells (C.I.E. 569/64); 1/ rubber nose clips

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1/ On the other hand, kayak paddles are classified as canoe paddles, item 990.30, because kayaks are a type of canoe (MFG 441.39 E 024634).

2/ Karate uniforms are classified as wearing apparel because they do not provide the wearer with sufficient protection to be considered protective equipment (CLA-2:ACV:MAC 054068 PR).

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used by swimmers (C.I.E. 2217/64); "spot-shots," a device inserted into the barrel of a shotgun to illuminate the shot pattern in order to aide the user developing shooting techniques and accuracy (ORR Ruling 72-0340); boomerangs designed for hunters to simulate the flight pattern of birds (ORR Ruling 1060-70); electronic precision targets (ORR Ruling 108-70); "hand target throwers," which throw clay targets (C.I.E. 18165); throwing knives (C.I.E. 101/66); sleds on skis (ORR Ruling 75-0152); skate sails, used by a person on skis (ORR Ruling 72-0190); "Skibobs," consisting of a U frame with a saddle seat and two skis, with the front ski being steered by the rider by means of a handle grip (C.I.E. 1074/65); protective pants for use in motorcycle racing (ORR Ruling 75-0083); 2/ kneecap guards for use in motorcycle racing (CLA-2:RRUCGC 064152 LCS); floor hockey sticks (ORR Ruling 74-0253); backpacks (US CIT, No. 73-12-03398, 1/13/81); backpacking tents (C.D. 4648); "Port-a-Score," a device used as a scoring mechanism in certain athletic events (ORR Ruling 230-71); "Indiaca," an elastic shuttlecock used in a game called Indiaca, which is played like volleyball (ORR Ruling 316-71); "whiz skid," which is similar to a bicycle on skis (ORR Ruling 1112-70); ice skate walker, an article of rubber which is attached to ice skate blades enabling the skater to walk outside the rink (ORR Ruling 212-69); curling brooms (T.D. 66-7(15)); jump ropes (T.D. 66-157(15)); indoor running tracks, complete with pole-vault, high-jump, and long-jump runways, and shotput rings (T.D. 66-169(30)); skateboard decks (T.D. 56535(123)); electrical fencing equipment (T.D. 56554(53)); paddle ball sets (T.D. 56237(90)); flying saucers, used to slide down snowy hillsides (T.D. 56237(86)), ankle and wrist weights (CLA-2:R:CV:MA 061492 NL); belts for flag football (CLA-2:R:CV:MA 74-035372 AD), seats for bicycle exercisers (C.I.E. 1461/65); steel castings which are used as components of bar bells and weight-lifting equipment (ORR Ruling 75-0014); plastic mouth guards with straps to attach to a helmet (CLA-2:R:CV:MA 057915 KW); shot puts (CLA-2:RRUCGC 064610 TJB), wooden structures for fitness trails (CLA-2: RRUCGC 062726 jh); duck decoy anchors (CLA-2:R:CV:MA 056522 JAS); climbing ropes used as physical education apparatus (T.D. 56241 (28); netting used by children for climbing in playground activity; "sliders," vehicles used to slide down runways which are made of asbestos-cement in mold plates and which have been placed on ski slopes or hills (CLA-2:R:CV:MA 033217 JP); broomball brooms (CLA-2:R:CV:MFG 023621 C); "jokari," a game played with a ball and two paddles; "tamburelli," a game played with a shuttlecock and two paddles; and stilts designed as athletic or playground equipment (C.I.E. 1741/66).

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Appendix D

Statistical Tables

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Table 1.--After-tax returns on sales, assets and investment for the sporting goods lines of 46 publicly held firms and for all manufactures, 1976-78

(In percent)

Indicator	1976	1977	1978
Return on sales:			
Sporting goods	3.5	3.4	3.1
All manufacturers	5.0	5.3	5.6
Return on assets:			
Sporting goods	4.5	4.9	4.4
All manufacturers	7.3	7.6	8.3
Return on investment:			
Sporting goods	11.3	12.3	12.6
All manufacturers	13.1	14.4	16.1

Source: Sporting Goods Manufacturers Association, A Study of Financial Performance in the Sporting Goods Industry 1979.

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Table 2.--Sporting goods: U.S. producers' shipments, exports of domestic merchandise, imports for consumption, and apparent consumption, 1976-80

Year	Producers' shipments	Exports	Imports	Apparent consumption	Ratio of imports to consumption
	1,000 dollars				Percent
1976	2,136,000	153,147	385,170	2,368,023	16
1977	2,216,900	172,865	480.421	2,504,456	19
1978	2,450,000	233,297	553,583	2,770,286	20
1979	1/ 2,663,000	289,704	594,702	2,967,998	20
1980	1/ 2,852,000	337,239	627,391	3,142,152	20

1/ Estimated. U.S. Industrial Outlook, 1981, p. 460.

Source: Compiled from official statistics of the U.S. Department of Commerce, except as noted.

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Table 3.--Fishing tackle: U.S. producers' shipments, exports of domestic merchandise, imports for consumption, and apparent consumption, 1976-80

Year	Producers' shipments	Exports	Imports	Apparent consumption	Ratio of imports to consumption
	1,000 dollars				Percent
1976	238,000	17,525	84,432	304,907	28
1977	270,100	18,523	101,375	352,952	29
1978	301,000	19,473	98,241	379,768	26
1979	1/ 335,000	25,417	105,907	415,490	25
1980	1/ 365,000	29,333	126,696	462,363	27

1/ Estimated. U.S. Industrial Outlook, 1981, p. 460.

Source: Compiled from official statistics of the U.S. Department of Commerce, except as noted.

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Table 4.--Golf equipment: U.S. producers' shipments, exports of domestic merchandise, imports for consumption, and apparent consumption, 1976-80

Year	Producers' shipments	Exports	Imports	Apparent consumption	Ratio of imports to consumption
	1,000 dollars				Percent
1976	339,000	55,154	18,725	302,571	6
1977	385,100	52,348	24,863	357,615	7
1978	379,000	75,009	30,397	334,388	9
1979	1/ 398,000	91,220	32,249	339,029	10
1980	1/ 422,000	92,159	35,262	365,103	10

1/ Estimated. U.S. Industrial Outlook, 1981, p. 460.

Source: Compiled from official statistics of the U.S. Department of Commerce, except as noted.

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Table 5.--Tennis equipment: U.S. producers' shipments, exports of domestic merchandise, imports for consumption, and apparent consumption, 1976-80

Year	Producers' shipments	Exports	Imports	Apparent consumption	Ratio of imports to consumption
	1,000 dollars				Percent
1976	1/ 100,000	7,279	49,982	142,703	35
1977	135,100	13,764	36,610	157,946	23
1978	2/ 114,000	17,976	37,465	133,489	28
1979	2/ 108,000	25,362	26,175	108,813	24
1980	2/ 119,000	35,252	28,177	111,925	25

1/ Estimated. "The 1979 Market," Selling Sporting Goods, June 1979.
2/ Estimated. U.S. Industrial Outlook, 1980, p. 427.

Source: Compiled from official statistics of the U.S. Department of Commerce, except as noted.

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Table 6.--Other sporting goods: U.S. producers' shipments, exports of domestic merchandise, imports for consumption, and apparent consumption, 1976-80

Year	Producers' shipments	Exports	Imports	Apparent consumption	Ratio of imports to consumption
	1,000 dollars				Percent
1976	1/ 1,459,000	73,190	232,031	1,617,841	14
1977	1,426,600	88,230	317,573	1,655,943	19
1978	2/ 1,656,000	120,839	387,481	1,922,642	20
1979	2/ 1,822,000	147,706	430,371	2,104,665	20
1980	2/ 1,946,000	180,495	437,255	2,202,760	20

1/ Estimated. "The 1979 Market," Selling Sporting Goods, June 1979, and U.S. Industrial Outlook, 1980, p. 427.

2/ Estimated. U.S. Industrial Outlook, 1980, p. 427, and U.S. Industrial Outlook, 1981, p. 460.

Source: Compiled from official statistics of the U.S. Department of Commerce, except as noted.

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Table 7.--Playground, gymnasium, gymnastic, and exercise equipment: U.S. producers' shipments, exports of domestic merchandise, imports for consumption, and apparent consumption, 1976-80

Year	Producers' shipments	Exports	Imports	Apparent consumption	Ratio of imports to consumption
	1,000 dollars				Percent
1976	1/ 266,000	7,658	11,390	269,732	4
1977	257,800	9,060	25,762	274,502	9
1978	1/ 260,000	14,306	20,292	265,986	8
1979	1/ 277,000	23,850	21,780	274,930	8
1980	1/ 305,000	22,061	25,723	308,662	8

1/ Estimated. U.S. Industrial Outlook, 1980, p. 427.

Source: Compiled from official statistics of the U.S. Department of Commerce, except as noted.

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Table 8.--Sporting goods: U.S. producers' shipments, by types, 1972 and 1977

Type	1972	1977	Share of total in 1977	Percentage change 1977, from 1972
	Million dollars	Million dollars	Percent	
Fishing tackle	167.7	270.1	12.2	61
Golf equipment	276.7	385.1	17.4	139
Tennis equipment	57.6	135.1	6.1	35
Other sporting goods	1,036.8	1,426.6	64.3	38
All sporting goods	1,538.8	2,216.9	100.0	40
Skateboards	1/	49.5	2.2	-
Ice-skates	5.7	21.4	1.0	275
Health, physical fitness, and exercise equipment	27.8	98.6	4.4	255
Archery equipment	21.9	63.7	2.9	191
Baseball mitts and gloves	4.2	12.2	.6	190
Athletic field equipment	9.5	26.0	1.2	174
Tennis equipment	57.6	135.1	6.1	135
Home playground equipment	25.6	57.2	2.6	123
Winter sports equipment (except skis and skates)	17.3	35.8	1.6	107
Gymnasium and gymnastic equipment	28.6	56.7	2.6	98
Roller skates	20.6	40.2	1.8	95
Snow skis	22.8	42.5	1.9	86
Water skis and surfboards	11.0	20.2	.9	84
Fishing tackle (except rods and reels)	88.0	154.6	7.0	76
Basketballs	19.0	30.7	1.4	62
Baseballs and softballs	15.3	24.0	1.1	57
Fishing reels	43.4	63.4	2.9	46
Golf clubs	126.5	181.4	8.2	43
Fishing rods	36.3	52.0	2.3	43
Golf equipment (except balls and clubs)	68.7	97.3	4.4	42
Institutional and commercial playground equipment	25.4	35.3	1.6	39
Underwater sports equipment	28.2	36.8	1.7	30
Golf balls	81.5	106.3	4.8	30
Footballs	17.7	21.7	1.0	23
Baseball bats	20.0	23.5	1.1	18
Body protective equipment	42.1	45.6	2.1	8
Inflatable sports balls (except footballs and basketballs)	18.0	19.0	.9	6
Billiard and pool tables	65.4	52.9	2.4	-19
Bowling equipment	197.8	102.2	4.6	-48
Billiard and pool equipment (except tables)	32.3	6.8	.3	-79
Other sporting goods	360.6	504.3	22.7	40

1/ Skateboards were not produced commercially in 1972.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table 9.--Sporting goods: U.S. imports for consumption, by principal sources, 1976-80

(In thousands of dollars)

Source	1976	1977	1978	1979	1980
Taiwan	71,466	86,621	117,818	135,691	189,005
Kor Rep	40,133	71,585	94,019	104,290	108,129
Japan	72,961	93,933	80,802	71,320	74,509
France	43,168	36,514	51,400	54,402	46,775
Canada	19,102	21,705	25,724	35,114	36,424
Haiti	18,066	18,581	26,063	30,608	32,104
Austria	14,186	19,581	23,976	33,368	22,709
Finland	5,521	7,091	11,923	15,569	13,274
Hq Kong	13,829	33,144	17,487	11,567	12,878
Sweden	11,817	11,018	11,749	12,130	11,349
All other	74,921	80,647	92,622	90,644	80,236
Total	385,170	430,421	553,583	594,702	627,391

Source: Compiled from official statistics of the U.S. Department of Commerce.

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Table 10--Sporting goods: U.S. imports by certain world areas including designated GSP countries, 1976-79 and January-September 1980

Item	Value (1,000 dollars)					
	1976	1977	1978	1979	Jan.-Sep. 1980	Jan.-Sep. 1980 percentage distribution
Gross imports	385,170	480,421	553,583	594,702	465,373	100
26 developed ctries, total	216,437	233,039	261,301	274,842	182,726	39
GSP countries, total	163,486	242,933	288,976	315,621	279,169	60
Taiwan	71,466	86,621	117,818	135,691	139,698	30
Kor Rep	40,133	71,585	94,019	104,290	84,057	18
Haiti	18,066	18,581	26,063	30,608	22,908	5
Hq Kong	13,829	33,144	17,487	11,567	9,686	2
Phil R	4,846	7,080	9,643	9,769	6,570	1
Mexico	4,697	5,926	7,399	7,369	5,710	1
Yugoslv	1,618	1,795	2,803	4,159	1,875	1/
Portugl	1,185	1,251	838	2,291	1,351	1/
Other GSP	7,647	16,911	12,905	9,877	7,315	2
Other	5,248	4,449	3,307	4,240	3,479	1

1/ Less than 0.5 percent.

Source: Compiled from official statistics of the U.S. Department of Commerce.

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Table 11.--Fishing tackle: U.S. imports for consumption, by principal sources, 1976-80

(In thousands of dollars)

Source	1976	1977	1978	1979	1980
Japan	28,472	37,458	34,503	35,302	41,010
Kor Rep	8,588	14,728	15,072	20,464	26,948
Taiwan	11,220	16,015	16,534	18,133	23,514
Sweden	9,340	8,578	7,566	7,829	8,951
France	11,832	7,326	7,590	4,611	5,440
Norway	4,179	3,093	3,716	4,627	4,743
Finland	1,579	2,448	3,453	4,379	4,738
Hg Kong	2,836	3,407	1,305	1,954	2,734
Haiti	552	861	966	1,559	1,585
FR Germ	1,394	1,933	1,557	1,468	1,522
All other	4,421	5,528	5,977	5,508	5,510
Total	84,432	101,375	98,241	105,907	126,696

Source: Compiled from official statistics of the U.S. Department of Commerce.

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Table 12.--Fishing tackle: U.S. imports by certain world areas including designated GSP countries, 1976-79 and January-September 1980

	Value (1,000 dollars)					
Gross imports	84,432	101,375	98,241	105,907	93,298	100
26 developed ctries, total	57,942	62,050	59,720	60,013	50,077	54
GSP countries, total	26,360	39,232	38,471	45,833	43,202	46
Kor Rep	8,588	14,728	15,072	20,464	20,326	22
Taiwan	11,220	16,015	16,534	18,198	17,735	19
Hg Kong	2,836	3,407	1,305	1,964	1,505	2
Haiti	552	861	966	1,558	1,032	1
Portugl	848	949	646	1,308	698	1
Mexico	619	1,483	1,551	611	428	1/
Singapr	128	182	360	440	325	1/
Salvadr	600	605	582	406	170	1/
Other GSP	968	1,001	1,455	885	982	1
Other	130	93	50	60	19	1/

1/ Less than 0.5 percent.

Source: Compiled from official statistics of the U.S. Department of Commerce.

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Table 13.--Fishing rods: U.S. imports for consumption, by principal sources, 1976-79 and January-June 1979 and 1980

Source	1976	1977	1978	1979	January-June 1979	January-June 1980
	Quantity (thousands)					
Taiwan	2,144	3,095	2,865	2,809	1,552	2,008
Kor Rep	1,224	2,140	2,180	2,221	1,387	1,445
Japan	1,404	1,513	1,454	913	733	208
Haiti	344	397	404	665	222	360
U King	3	1	1	1	1	3
Hg Kong	52	23	8	55	5	5
N Zeal	0	1/	1/	1/	1/	1/
France	1/	1/	1/	8	5	1/
All other	193	242	8	3	2	1/
Total	5,365	7,411	6,921	6,676	3,908	4,031
	Value (1,000 dollars)					
Taiwan	5,374	9,761	9,536	10,053	5,523	7,031
Kor Rep	3,231	5,852	6,590	7,826	4,544	5,587
Japan	4,541	6,016	5,119	3,664	2,151	1,832
Haiti	401	632	682	1,170	388	403
U King	36	22	18	55	24	13
Hg Kong	145	102	8	37	5	18
N Zeal	-	1	12	32	19	6
France	2	22	1	14	10	1/
All other	691	639	34	11	8	6
Total	14,420	23,047	22,000	22,863	12,674	14,894
	Unit value					
Taiwan	$2.51	$3.15	$3.33	$3.58	$3.56	$3.50
Kor Rep	2.64	2.74	3.02	3.52	3.28	3.87
Japan	3.23	3.98	3.52	4.01	2.94	8.79
Haiti	1.16	1.59	1.69	1.76	1.75	1.12
U King	10.82	16.26	25.39	44.56	40.56	3.93
Hg Kong	2.78	4.51	1.09	0.68	1.03	3.50
N Zeal	-	30.28	64.97	69.26	61.69	42.28
France	9.14	48.48	4.12	1.79	2.04	21.25
All other	3.58	2.64	4.40	3.59	3.49	17.51
Average	2.69	3.11	3.18	3.42	3.24	3.70

1/ Less than 500.

Source: Compiled from official statistics of the U.S. Department of Commerce.

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Table 14.--Fishing rods: U.S. imports by certain world areas including designated GSP countries, 1976-79 and January-June 1980

Item	1976	1977	1978	1979	Jan.-Jun. 1980	Jan.-Jun. 1980 percentage distribution
	Quantity (thousands)					
Gross imports	5,365	7,411	6,921	6,676	4,031	100
26 developed ctries, total	1,408	1,529	1,456	926	212	5
GSP countries, total	3,929	5,859	5,457	5,750	3,819	95
Taiwan	2,144	3,095	2,865	2,809	2,008	50
Kor Rep	1,224	2,140	2,180	2,221	1,445	36
Haiti	344	397	404	665	360	9
Hg Kong	52	23	8	55	5	1/
Jamaica	157	135	0	0	0	
Portugl	0	67	0	0	0	
India	8	3	0	0	0	
Other	28	23	7	0	0	
	Value (1,000 dollars)					
Gross imports	14,420	23,047	22,000	22,863	14,894	100
26 developed ctries, total	4,582	6,088	5,154	3,777	1,857	12
GSP countries, total	9,709	16,866	16,817	19,086	13,038	88
Taiwan	5,374	9,761	9,536	10,053	7,031	47
Kor Rep	3,231	5,852	6,590	7,826	5,587	38
Haiti	401	632	682	1,170	403	3
Hg Kong	145	102	8	37	18	1/
Jamaica	528	514	-	-	-	
Portugl	-	3	-	-	-	
India	30	2	-	-	-	
Other	129	93	30	-	-	

1/ Less than 0.5 percent.

Source: Compiled from official statistics of the U.S. Department of Commerce.

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Table 15.--Fishing reels: U.S. imports for consumption, by principal sources, 1976-79 and January-June 1979 and 1980

Source	1976	1977	1978	1979	January-June 1979	January-June 1980
	Quantity (thousands)					
Japan	3,572	4,873	3,832	3,243	2,089	1,929
Kor Rep	1,446	1,734	1,645	1,988	962	1,756
Sweden	512	451	367	388	238	227
France	1,174	644	634	269	228	123
FR Germ	72	123	47	54	45	22
Taiwan	517	589	456	479	262	432
Hg Kong	982	1,049	173	220	176	80
U King	32	16	18	23	16	10
All other	8	9	8	7	5	4
Total	8,316	9,488	7,186	6,579	4,022	4,183
	Value (1,000 dollars)					
Japan	15,678	23,300	22,633	24,200	14,283	16,146
Kor Rep	3,195	5,879	6,024	8,694	4,490	6,140
Sweden	8,991	8,320	7,282	7,674	4,632	5,150
France	10,286	5,892	5,389	2,988	2,537	1,473
FR Germ	876	1,422	563	756	522	357
Taiwan	621	711	585	680	378	809
Hg Kong	1,806	2,113	339	490	303	298
U King	325	222	273	413	255	252
All other	84	230	160	163	118	66
Total	41,863	48,088	44,239	46,057	27,518	30,712
	Unit value					
Japan	$4.39	$4.78	$5.91	$7.46	$6.84	$8.37
Kor Rep	2.21	3.39	3.66	4.37	4.67	4.43
Sweden	17.57	18.45	19.83	19.80	19.48	22.72
France	8.76	9.15	10.07	11.12	11.13	11.95
FR Germ	12.10	11.53	12.05	11.89	11.47	12.81
Taiwan	1.20	1.21	1.28	1.42	1.44	2.01
Hg Kong	1.84	2.02	2.19	2.23	1.72	3.73
U King	10.26	13.66	14.80	17.93	15.55	24.26
All other	10.12	25.92	20.85	24.31	21.95	18.20
Average	5.03	5.07	6.16	6.90	6.84	7.33

Source: Compiled from official statistics of the U.S. Department of Commerce.

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Table 16.--Golf equipment: U.S. imports by certain world areas including designated GSP countries, 1976-79 and January-September 1980

Item	Value (1,000 dollars)					
	1976	1977	1978	1979	Jan.-Sep. 1980	Jan.-Sep. 1980 percentage distribution
Gross imports	18,725	24,863	30,397	32,249	26,158	100
26 developed ctries, total	7,464	9,673	10,408	9,411	7,809	30
GSP countries, total	8,966	13,823	19,700	22,806	18,332	70
Kor Rep	3,484	7,838	12,038	11,023	9,145	35
Taiwan	1,157	1,262	1,730	4,000	3,862	15
Phil R	2,524	2,668	3,331	3,489	2,064	8
Mexico	1,331	1,405	2,008	2,316	1,739	7
Portugl	245	217	165	836	402	2
Thailnd	-	-	42	793	751	3
Hg Kong	180	196	234	141	155	1
Salvadr	21	90	53	117	143	1
Other GSP	24	147	99	92	72	1/
Other	2,295	1,367	288	32	17	1/

1/ Less than 0.5 percent.

Source: Compiled from official statistics of the U.S. Department of Commerce.

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Table 17.--Golf equipment: U.S. imports for consumption, by principal sources, 1976-80

(In thousands of dollars)

Source	1976	1977	1978	1979	1980
Kor Rep	3,484	7,838	12,038	11,023	12,080
Japan	4,514	5,887	7,566	5,364	5,878
Taiwan	1,157	1,262	1,730	4,000	4,943
Phil R	2,524	2,668	3,331	3,489	3,519
Canada	387	335	622	1,980	2,438
Mexico	1,331	1,405	2,008	2,316	2,293
U King	1,701	2,762	1,537	1,389	1,828
Thailnd	-	-	42	793	824
Portugl	245	217	165	836	503
N Zeal	93	87	188	313	382
All other	3,289	2,402	1,168	746	575
Total	18,725	24,863	30,397	32,249	35,262

Source: Compiled from official statistics of the U.S. Department of Commerce.

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Table 18.-- Tennis equipment: U.S. imports for consumption, by principal sources, 1976-80

(In thousands of dollars)

Source	1976	1977	1978	1979	1980
Taiwan	18,651	12,996	8,761	6,158	9,532
Belgium	5,587	3,136	5,324	3,309	4,389
France	1,104	1,064	2,224	2,984	3,088
Japan	7,177	6,442	6,927	3,778	2,453
Mexico	-	5	188	662	1,691
Austria	198	252	276	443	1,577
U Kingq	8,103	3,887	5,748	4,745	1,488
FR Germ	649	857	972	916	896
Kor Rep	2,231	3,469	2,614	982	760
Italy	334	70	254	568	629
All other	5,949	4,433	4,176	1,629	1,674
Total	49,932	36,610	37,465	26,175	28,177

Source: Compiled from official statistics of the U.S. Department of Commerce.

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Table 19--Tennis equipment: U.S. imports by certain world areas including designated GSP countries, 1976-79 and January-September 1980

Item	Value (1,000 dollars)					
	1976	1977	1978	1979	Jan.-Sep. 1980	Jan.-Sep. 1980 percentage distribution
Gross imports	49,982	36,610	37,465	26,175	21,116	100
26 developed ctries, total	27,241	19,061	24,902	17,508	12,033	57
GSP countries, total	22,612	17,408	12,461	8,556	9,083	43
Taiwan	18,651	12,996	8,761	6,158	6,909	33
Kor Rep	2,231	3,469	2,614	982	550	3
Mexico	-	5	188	662	1,013	5
Pakistn	1,234	372	346	293	173	1
Hg Kong	283	307	353	254	107	1
Portugl	61	57	8	140	246	1
Phil R	89	85	86	37	11	1/
Uruguay	-	-	85	20	3	1/
Other GSP	63	117	20	9	72	1/
Other	129	141	102	112	1	1/

1/ Less than 0.5 percent.

Source: Compiled from official statistics of the U.S. Department of Commerce.

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Table 20.--Other sporting goods: U.S. imports for consumption, by principal sources, 1976-80

(In thousands of dollars)

Source	1976	1977	1978	1979	1980
Taiwan	40,438	56,348	90,793	107,335	151,016
Kor Rep	25,830	45,551	64,295	71,822	68,341
France	30,170	28,104	41,585	46,787	38,246
Canada	17,781	20,204	24,706	32,645	33,428
Haiti	17,513	17,720	25,096	29,048	30,488
Japan	32,799	44,146	31,805	26,876	25,168
Austria	13,988	19,330	23,699	32,925	21,133
Hg Kong	10,531	29,234	15,595	9,209	9,842
FR Germ	3,962	5,616	8,552	8,712	8,840
Finland	3,922	4,643	8,445	11,190	8,536
All other	35,098	46,679	52,909	53,824	42,216
Total	232,031	317,573	387,481	430,371	437,255

Source: Compiled from official statistics of the U.S. Department of Commerce.

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Table 21--Other sporting goods: U.S. imports by certain world areas including designated GSP countries, 1976-79 and January-September 1980

Item	Value (1,000 dollars)					
	1976	1977	1978	1979	Jan.-Sep. 1980	Jan.-Sep. 1980 percentage distribution
Gross imports	232,031	317,573	387,481	430,371	324,801	100
26 developed ctries, total	123,790	142,255	166,271	187,910	112,806	35
GSP countries, total	105,548	172,470	218,344	238,426	208,552	64
Taiwan	40,438	56,348	90,793	107,335	111,192	34
Kor Rep	25,830	45,551	64,295	71,822	54,036	17
Haiti	17,513	17,720	25,096	29,048	21,860	7
Hg Kong	10,531	29,234	15,595	9,209	7,920	2
Phil R	2,232	4,324	5,336	6,177	4,279	1
Yugoslv	1,618	1,786	2,803	4,159	1,875	1
Mexico	2,746	3,033	3,651	3,779	2,530	1
India	912	1,372	1,815	1,508	892	1/
Other GSP	3,728	13,104	8,961	5,390	3,969	1
Other	2,693	2,848	2,866	4,036	3,442	1

1/ Less than 0.5 percent.

Source: Compiled from official statistics of the U.S. Department of Commerce.

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Table 22.--Sporting goods: U.S. exports of domestic merchandise, by principal markets, 1976-80

(In thousands of dollars)

Market	1976	1977	1978	1979	1980
Japan	43,198	40,044	62,389	86,126	79,404
Canada	38,837	38,623	43,676	45,120	43,933
U King	8,751	16,490	15,962	19,684	26,761
FR Germ	7,789	9,492	10,639	15,250	22,716
Haiti	5,564	8,701	15,236	16,031	17,586
Mexico	4,202	4,712	6,670	9,338	16,793
Austral	4,203	4,137	5,683	8,705	11,033
Sweden	3,412	3,654	5,436	6,160	8,956
Venez	2,376	3,571	6,706	6,857	8,756
France	3,394	4,149	6,187	6,126	8,068
All other	31,421	39,292	54,714	70,308	93,232
Total	153,147	172,865	233,297	289,704	337,239

Source: Compiled from official statistics of the U.S. Department of Commerce.

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Table 23.--Fishing tackle: U.S. exports of domestic merchandise, by principal markets, 1976-80

(In thousands of dollars)

Market	1976	1977	1978	1979	1980
Canada	6,584	6,464	6,606	7,167	7,419
Japan	2,076	2,141	3,476	4,787	4,786
U King	1,060	1,193	964	1,592	1,776
Sweden	309	363	412	856	1,453
Austral	881	950	674	973	1,383
Rep Saf	386	270	480	419	863
Argent	2	18	77	744	855
Mexico	459	630	540	665	784
Italy	180	166	214	269	765
FR Germ	414	567	437	617	699
All other	5,174	5,756	5,594	7,328	8,549
Total	17,525	18,523	19,473	25,417	29,333

Source: Compiled from official statistics of the U.S. Department of Commerce.

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Table 24.--Golf equipment: U.S. exports of domestic merchandise, by principal markets, 1976-80

(In thousands of dollars)

Market	1976	1977	1978	1979	1980
Japan	31,940	29,229	42,652	53,744	47,188
U King	4,855	4,191	7,993	11,061	15,321
Canada	7,375	8,701	9,410	9,063	7,732
Rep Saf	611	841	1,186	2,326	3,998
Austral	1,458	892	1,350	2,190	1,986
Mexico	958	1,182	1,664	1,703	1,946
Singapr	1,512	1,475	2,075	1,390	1,755
Sweden	1,025	903	1,169	1,466	1,740
FR Germ	1,188	916	1,133	1,395	1,407
Hg Kong	984	886	1,426	1,284	1,226
All other	3,248	3,131	4,947	5,597	7,861
Total	55,154	52,348	75,009	91,220	92,159

Source: Compiled from official statistics of the U.S. Department of Commerce.

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Table 25.--Tennis equipment: U.S. exports of domestic merchandise, by principal markets, 1976-80

(In thousands of dollars)

Market	1976	1977	1978	1979	1980
Japan	792	771	1,910	3,938	6,602
FR Germ	436	686	1,135	2,581	3,721
France	568	625	767	1,446	2,306
Canada	905	1,155	1,817	2,009	2,116
Singapr	669	1,463	1,469	1,435	2,099
Mexico	392	627	1,193	1,654	1,938
Austria	353	1,445	831	1,260	1,801
U King	200	601	608	1,120	1,607
Switzld	62	1,021	1,154	1,276	1,287
Hg Kong	640	625	1,408	1,315	1,163
All other	2,263	4,746	5,684	7,329	10,611
Total	7,279	13,764	17,976	25,362	35,252

Source: Compiled from official statistics of the U.S. Department of Commerce.

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Table 26.--Other sporting goods: U.S. exports of domestic merchandise, by principal markets, 1976-80

(In thousands of dollars)

Market	1976	1977	1978	1979	1980
Canada	23,973	22,304	25,844	26,881	26,666
Japan	8,390	7,903	14,351	23,657	20,828
FR Germ	5,751	7,323	7,933	10,657	16,889
Haiti	5,181	7,901	14,848	15,314	16,885
Mexico	2,394	2,274	3,273	5,315	12,126
U King	2,636	10,500	6,392	5,911	8,056
Venez	1,945	2,683	5,836	6,329	7,856
Austral	1,715	2,044	3,448	5,248	6,934
Switzld	1,844	2,792	3,250	4,218	5,977
S Arab	1,297	898	2,173	3,107	5,803
All other	18,064	21,607	33,490	41,069	52,475
Total	73,190	88,230	120,839	147,706	180,495

Source: Compiled from official statistics of the U.S. Department of Commerce.

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SUMMARIES OF TRADE AND TARIFF INFORMATION

USITC PUBLICATION 841

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